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ABSTRACT

This report is an introduction to the concept of lifelong learning as a key to unlocking resources for an aging society. It describes a myriad of learning programs for older adults, from those provided by giant companies, to those conducted by small community centers, to those developed and run by elderly persons themselves. Programs are described for the healthiest adult learners and for those with Alzheimer's disease. The report covers formal education, informal education, education in the workplace, and intergenerational programs. Laws that affect education for older adults and agencies that can be of help to those interested in lifelong learning are described. Four appendixes address education as a lifelong process, include two quizzes prepared by the National Institute on Aging, summarize major federal statutes providing assistance for continuing education, and summarize state statutes or policy concerning tuition fees in higher education institutions. Twenty-nine references are cited in a bibliography and 31 addresses for programs and resources are provided. (KC)

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102D CONGRESS
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LIFELONG LEARNING FOR AN AGING SOCIETY

AN INFORMATION PAPER

PREPARED FOR USE BY THE

SPECIAL COMMITTEE ON AGING
UNITED STATES SENATE

U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)

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DECEMBER 1991

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PREFACE

If you could drop in on adult learning programs offered by the Cherokee Nation of Oklahoma, Motorola, Inc., or Harvard University, you would be struck first and foremost by the enthusiasm of adult students for learning. Whether the goal is learning to read in order to help grandchildren with their homework, training for changing technology, or studying "Legal Issues—Constitutional and Otherwise," for self-interest, the older adult has both a real appreciation for the value of education and an excitement at having a second chance.

Enthusiasm for lifelong learning is a good thing, for statistics tell us that today's Americans are living longer than their ancestors, and statistics also tell us that older Americans will soon be a much larger, more powerful share of our general population. It will be in our own best interest to learn how to take care of ourselves over an extended lifetime, and it will be in our Nation's best interest to enlist the aid of an informed older population that cannot only take better care of itself but also assume a leadership role, sharing its skills and knowledge with the generations that come after them.

America was built on the idea of neighbor helping neighbor, generation helping generation. The America of the future will continue this tradition—through education. Already, college students from Temple University are teaching elder Hispanic and Asian refugees to read and to adjust to their new homeland. Retirees are coming to the college campus at the University of North Carolina at Asheville to take courses at the North Carolina Center for Creative Retirement, and they stay on to become tutors, mentors, and career counselors in a program called SAIL (Senior Academy for Intergenerational Learning): retired doctors share their expertise with premed students; computer-wise retirees work with

computer science students on projects to benefit UNCA; older adults who enjoy athletics are matched with university athletes who share the same career interests. Elders are simultaneously students, teachers, and role models.

Americans need a new self-image, a new mirror that reflects a truer picture of their potential. Lifelong learning is that shiny, new mirror that reflects what we could be if we learned to maintain our health, to stretch our resources, to remain independent and contributing, to adapt to changes in our technological world, to smile as we pursued new activities we had never tried before, and to use our knowledge and skills to reach out to those who need us.

In corporate surroundings, senior centers, and university classrooms all over America, elders are beginning to redefine the concept of old age. Their nontraditional learning programs are actually creative learning experiments born out of need—the need of older people to be as productive as their talents and energies, not their ages, allowed, and the need of America to enlist the aid of experienced elders. Lifelong learning programs are the explosions heard 'round the country in our aging revolution.

This publication, rather than attempting to be a definitive work on education for the older adult, is an introduction to the concept of lifelong learning as a key to unlocking resources for an aging society. The picture painted will be as small as "The Talk Show," a program that serves about 75 people at the Siouxland Senior Center in Iowa, and as big as General Electric. It will be as ethereal as the spirit at the LaFarge Lifelong Learning Institute and as practical as an ABLE (Ability Based on Long Experience) program. There are programs highlighted for the healthiest older adult learner and programs for those with Alzheimer's disease. This report will cover formal education, informal education, education in the workplace, and intergenerational programs. It will give you a glimpse of the future through lifelong learning, and it will acquaint you with laws that affect education for the older adult. Agencies that can be of help to those interested in lifelong learning will be featured.

Many individuals and organizations need to be thanked for their contributions to this publication. They

were the Committee's eyes and ears throughout the country so that we could learn about lifelong learning programs in America. State agencies, Federal agencies, businesses and organizations in the private sector, the academic community, and interested individuals all enthusiastically sent in information. Education seems to touch everyone in a special way. We learned a great deal from their contributions.

The Committee would also like to thank Dr. Lydia Brontë for serving as a valuable resource and for contributing an original article to the print. Kevin B. Greely and M. Ann Wolfe of the Congressional Research Service contributed the chapters on laws affecting education for older adults, and they, as well as the many people who work for the Congressional Research Service, deserve to be thanked for their valuable contributions. Donald Fowles of the Administration on Aging kindly provided up-to-date statistics. And finally, credit is due to Daniel Tuite of the Government Printing Office and to Eileen Oberman of the Aging Committee staff for editorial assistance in the development of this print.

Committee Fellow Ann Arnof Fishman brings her enthusiasm and dedication to this examination of educational opportunities for older adults. She merits special recognition as the principal author and editor of this study.

DAVID PRYOR,
Chairman.
WILLIAM COHEN,
Ranking Minority Member.

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INTRODUCTION

Statistics stand out like bright yellow road signs telling Americans that there are changes in the road ahead:

—A baby born in the United States in 1900 was expected to live an average of 47.3 years, while a baby born in 1987 is expected to live an average of 75 years.[1]

—Young people (under 18) currently outnumber the elderly (65 or over) by more than two to one but will be outnumbered by the elderly in the year 2030.[2]

—By that same year, the older population is projected to represent 22 percent of the U.S. population, several percentage points higher than it represents in Florida today (18 percent).[3]

Simply put, Americans are living longer, and America is becoming an "aging" society.

Changes bring problems and challenges but mainly demand our ability to make those changes work in our favor. The way we do things today needs to be reexamined for future value. In particular, the way we train ourselves to get along in our world—our education—needs to be reexamined.

In the past, most Americans followed a pattern of school in the early years, work in the middle years, and retirement in the later years. Neel Buell, Director of the Emeritus Institute, Coastline Community College Foundation, sums up how Americans traditionally viewed education: "Until recently it appeared that many felt that education was like the measles, you were exposed at an early age and then got over it somehow."

A longer lifespan, however, is a gift given to us with strings attached. For the gift, to be of any value, requires the recipient to be educated throughout an entire

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[1] *Aging America, Trends and Projections*, forthcoming edition.
[2] *Ibid.*
[3] *Ibid.*

lifetime—to know how to maintain good health, to know how to stretch financial resources over a longer period of time, and to know how to adapt to changes in a technological world. Dr. James Birren, founder of the Nation's first school for the study of aging at the University of Southern California in the 1960's,[4] points out that linear education (school-work-retirement) "can be viewed as a single inoculation that is expected to be adequate for the rest of one's life, whereas * * * lifelong education * * * is like a booster shot, in which repeated exposures over time are required to sustain the desired level of protection." [5]

Lifelong learning can improve the quality of life for each of us as well as influence public and private policy. Included in this Committee publication is a reprint of an article written by Dr. Harry R. Moody for the Carnegie Corporation report *Our Aging Society: Paradox and Promise.*[6] Dr. Moody, Deputy Director of Hunter College's Brookdale Center on Aging, believes that lifelong education can help older people become more self-sufficient, more able to deal with the problems of aging, and less dependent on programs funded by a dwindling government budget. He sees a potential for promoting good health and preventing illness by teaching older people how to care for themselves, thus possibly reducing the billions of dollars spent on medical treatment. Dr. Moody further encourages programs that retrain older workers, opening up new possibilities for a more productive work force, one that competes in the international market with skilled rather than cheap labor. He promotes the mixing of generations through intergenerational learning programs, allowing opportunities for each generation to better understand the other's needs. When people are not segregated by age, they are better able to see the bigger picture. In other words, communities with large numbers of older people would not vote down taxes targeted for public school improvements simply because it did not affect them directly.

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[4] Dr. Birren is currently Director of the Anna & Harry Borun Center for Gerontological Research at the University of California, Los Angeles.

[5] From an address to the Southern Gerontological Society, as quoted in Robert A. Harootyan and Nina S. Feldman, "Lifelong Education, Lifelong Needs: Future Roles in an Aging Society," *Educational Gerontology,* 16:347-358, 1990, pp. 350-351.

[6] See Appendix A, p. 83.

Americans must first redefine old age and break through the stereotypes prevalent about older people. (The National Institute on Aging offers a quiz on the effect of aging on the brain and a quiz to test your "aging I.Q." Turn to Appendix B to see how you rate.) [7] Once we have a truer picture of the older American and begin to acknowledge the underutilized potential, we must find ways to tap into their tremendous energy and resources for the benefit of both the individual and society. As individuals, we will have to learn how to successfully manage a longer life. As citizens, we will have to pass on our skills to help younger generations.

America will enlist its older adults to deal with problems faced by our Nation. Already in place, D.O.V.E.S. (Dedicated Older Volunteers in Educational Service) serve as classroom assistants and offer specialized knowledge to the Los Angeles public schools, SAIL (Senior Academy for Intergenerational Learning) matches retired civic and professional leaders with undergraduate students to work together on learning projects at the University of North Carolina-Asheville, and the volunteers of OASIS (Older Adult Service and Information System) undergo specialized training and are then paired for a full school year with first, second, and third graders who have underdeveloped reading and language skills. Today's older Americans, remembering what they felt when President Kennedy called upon them to "ask what you can do for your country," are already redefining old age at a brisk new pace.

In the following chapter, Dr. Lydia Brontë, former Director of the Carnegie Corporation's Aging Society Project [8] and now Director of The Long Careers Study, encourages a new attitude toward getting older—it could be a time we looked forward to, a time to finally try all the things we had been putting off, a time full of new enthusiasm for life. Dr. Brontë says that Americans don't like old age. But she also says that life is full of surprises for this and future generations. Who knows, we might even learn to like ourselves as the "new" older Americans.

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[7] See page 103.

[8] *Our Aging Society: Paradox and Promise*, Norton, 1986, is co-edited by Alan Pifer and Lydia Brontë.

Chapter 1

THE "NEW" OLDER AMERICAN

(By Lydia Brontë, Ph.D.)

If you didn't know how old you was, how old would you be?—SATCHEL PAIGE.

INTRODUCTION

During the twentieth century, human life has been more dramatically transformed than at any other period in history.

In less than 100 years, Americans have moved from horse-drawn carriages to the automobile, the airplane, and the space shuttle; from kerosene lamps and gaslights to electric lights and laser technology. We have gone from writing our everyday communications by hand, to using typewriters, then personal computers, then to sending fax transmissions through telephone wires.

In 1900, we needed 10 days to 2 weeks to reach Europe by ocean liner. Today the Concorde carries us the same distance in a mere 3 hours. In 1900, the first functioning airplane had not yet been invented, although human beings had dreamed about it for centuries. In 1968, less than one lifetime later, we watched as the first man stepped onto the rocky soil of the Moon, his image beamed back to Earth through television signals.

The changes in our personal lives may seem less obvious, but they are just as astonishing. One of the most unexpected is the change in the length of time we live, and in the character of "old age." The new older Americans are the first generation in history to live in large numbers to their 70's, 80's, and 90's—ages unattainable for the great majority of our ancestors. Most importantly, the majority of these new older people are in good health. It is a truly unprecedented development.

It is also a trend which appears likely to continue: average life expectancies are still rising, and although

they rise unevenly—sometimes rapidly and sometimes more slowly—there is no sign at present that they are likely to stop. Some demographers predict that the average life expectancy at birth in the United States could reach 100 by the middle of the next century—perhaps even sooner, depending on as-yet undiscovered scientific advances.

Americans generally dislike the idea of growing old. But life is full of surprises: one of them is that the trend toward longevity has many positive aspects.

The Length of Adulthood Has Doubled

In 1900, Americans thought that adulthood started at about age 20 and extended roughly to age 50, an active adult life of only about 30 years. Now, with life expectancies in the mid to late 70's and still climbing, the ordinary active adult life reaches from age 20, to 75 or 80—approximately twice as long.

Old Age Doesn't Begin at 65

Since the 1930's, when age 65 was selected by the Social Security Commission as the age at which pension benefits began, we have believed that 65 was the inalterable beginning of old age. But this was a somewhat arbitrary definition, based on the German pension system—not on any scientific knowledge about aging.

In fact, what is considered "old" is as much a matter of social custom as it is of biology. At the beginning of this century "old age" started much earlier: it was generally thought that a woman was "old" at 30 and a man "old" at 40. These definitions crept forward very slowly. In the 1930's, sociologist Dr. John H. Riley was told by a friend of his in the Civil Service that as far as hiring guidelines were concerned, the Civil Service defined an "older woman" as "any woman over 35."

For reasons no one has yet fully deciphered, the period of vitality in the middle of life has lengthened as longevity has increased. It isn't that people are elderly at 60 or 65 and we've tacked on an extra 20 or 30 years of old age after that. It is that we aren't getting old on the same schedule any more. Between the boundaries of childhood at one end of the life course, and old age at the other, time has mysteriously expanded, somewhat like an accordion.

Physical old age now begins much later than 65 for many people. For some, it has not yet started even when they are in their 80's or 90's. In the study of working older people which I am currently conducting—The Long Careers Study—there are people as old as 92 who do not show what we think of as the traditional signs of physical aging: they are healthy, physically active and energetic, their mental powers are sharp, and they have active work and social lives. Their appearance is what we would expect of a person 20 or 30 years younger than their real chronological age.

We've Gained a Second Middle Age

The time added by the new longevity does not belong to the conventional age categories we have been accustomed to. It is not part of the 35-to-50 "middle age," and it is just as surely not part of traditional "old age." In effect, a new stage of adult life has been created, bracketed between these two traditional stages. It is a second middle age, which takes place roughly between the ages of 50 and 75.

It's important to remember that while in general the second middle age extends from age 50 to 75, occupying roughly the third quarter of a hundred year life span, in individual experience *its end point isn't rigidly fixed.* The aging process is highly individual. For some people the second middle age extends into their 80's or even their 90's. A few never seem to get "old" in the conventional sense at all. They reach what Dr. James Birren calls a "plateau of healthy functioning" at some point in their 60's or 70's, and sustain it for the rest of their lives—with no marked physical decline, and, at the end of life, either a short illness or no illness at all.

"Old" Doesn't Mean "Sick"

We have grown so accustomed to seeing media presentations about the ill elderly that we have lost sight of the fact that at any given time, only about 5 percent of all older people are seriously ill. An additional 10 percent have a physical problem which is partially limiting.

To put it the other way around: *85 percent of our over-65 population are essentially healthy normal adults.*

They have no real physical problems and they are living their lives pretty much as other adults do.

This may seem unbelievable, because of the tremendous concern during the past decade about long-term care, Medicare and Medicaid, and Alzheimer's; and about providing for the growing numbers of older people in our population. But nevertheless, it is there. The vast majority of people over 65 are in good health. As the *percentage* of older people in our population increases, the *number* of older people will necessarily increase—so that the institutionalized 5 percent will be a much bigger number. But the healthy 85 percent will be a much larger number, too.

It is also important to note that because the process of aging is so individual, statistical averages don't predict the path of any given person. Other factors can have a huge impact on your state of health and length of life. For example, health habits and lifestyle become even more important in a longer life—smoking or drinking to excess or being overweight, for example, can speed up the aging process and significantly shorten the length of life. The most physically feeble participant in The Long Careers Study was one of the youngest—at 67, he was suffering from advanced emphysema as a result of smoking 5 or 6 packs a day for roughly 30 years. He was weaker than the oldest member of the study—a 101-year-old biochemist—and he died a month after his interview for the study. (The 101-year-old biochemist outlived the man by 2 years, and continued going to his office to work until just a short time before his death.)

Because of the highly individual quality of the aging process, we need all of the income and health-care support systems currently in place—none of the advances in longevity should be seen as a rationale for diminishing them. There will always be some people who are physically old and in poor health in their 60's. And it may be that the sense of safety given us by the existence of Social Security has helped to make the expansion of longevity possible, by eliminating an important source of life stress.

Mental Decline Is Not a Part of Normal Aging

Before Alzheimer's disease became widely known in this country in the 1970's, Americans believed that se-

nility was a part of normal aging. Now we know that mental decline is due to specific disease conditions, chiefly to Alzheimer's. Age alone doesn't cause it.

The existing scientific research shows that barring illness, aging does not cause decline in mental powers, in creativity, or in the ability to remember things. If you're smart and creative to start with, you'll stay smart and creative throughout your life, unless you're unlucky enough to come down with a specific disease which affects functioning.

As our longevity increases, one of the highest items on the national list of priorities ought to be solving the riddle of Alzheimer's. Most of us would actually be quite eager to live longer lifetimes if we knew that the specter of Alzheimer's had been exorcised.

There Are Advantages to Maturity, Although Americans Haven't Yet Fully Recognized What They Are—or Even That They Exist

As a nation we are so hooked on the joys of youth that it doesn't occur to us that some things do get better with time. Some skills, for instance, take a number of years to develop fully; only then does the person really achieve mastery.

The skills involved in dealing with human systems fall into that category. It takes time to develop as a manager, an administrator, a company president, a judge, a legislator. Similarly, in professions in which the essential knowledge of the field is dense and highly complex, one must master an immense body of knowledge, part of it written and part of it derived from living experience. There are a number of jobs and professions in which people often continue to very old ages, for the simple reason that once they have attained a high level of skill, it makes sense for them to keep using it and developing it further.

Some cultures have known this for a long time—the top management of Japanese companies are often men in their 70's and 80's. It is assumed that the wisdom they have acquired is a bonus for their companies. From our perspective at the moment, there's no reason to doubt that.

There is a second unrecognized advantage to maturity. It seems that there is a point in the developmental

process when we stop "growing up," and start "growing out." Many of The Long Careers Study participants appear to have reached a point where they had resolved many of their life's personal tasks; they then began to be more deeply involved in working on problems affecting the larger community. As former Secretary of Labor Willard Wirtz once remarked, our society doesn't have a shortage of major problems. It would make sense to try to enlist some of these long-lived, experienced and highly-skilled people in the effort to solve some of the society's problems, instead of relegating them to the sidelines. If The Long Careers Study participants are an example, there are many wise minds in our older population who might be willing to sign on.

In a Long-Lived Society, Work and Continued Education Will Remain Important to People Throughout Their Lifetimes, Regardless of How Long They Live

The concept of retirement was based partly on the assumption that most people would be physically worn out by age 65, and that they would not live much beyond that. From this viewpoint retirement was seen as the pot of gold at the end of life's rainbow, the just reward for someone who, at 65, is genuinely old and wants little activity.

Neither of those propositions is true in 1991. The majority of workers hold jobs which do not wear them out physically. And relatively few Americans are physically old by the age of 65. People who don't like their work want to retire from it; they are then free to find activities which they do like. And people who have already found work they love often want to continue it indefinitely.

The potential for growth, development, and creativity exists throughout life. It is not affected by simple chronology. One of the most surprising results of The Long Careers Study is that 20 percent of the participants had their major career peak, or their only career peak, after the age of 50, or in some cases after the age of 65. Approximately 10 percent of the group *started* a new career—or their *only* career—after the age of 50, and a few began a new career after 65 which proved to be the most satisfying and productive career in their worklife.

Many participants re-entered formal education in later adulthood, one earning a Ph.D. in his 50's and one training as a psychotherapist in her 60's. (At 77 she is still in practice.) Others pursued further learning on a more casual basis, but all felt the opportunity for continued study was one of the great benefits of long life.

Your ability to grow and expand, both mentally and emotionally, will last as long as you are alive. It is literally almost never too late to start something new. The only real limitations are our ideas and beliefs, and those we can change. In our time-starved society, where there is never enough time to do everything we want to do, increased longevity is a gift beyond all expectations.

Chapter 2

FORMAL EDUCATION

I saw an encyclopedia company magazine ad showing a tombstone, inscribed with the words, "He died at 35, but they didn't bury him until he was 70." A true example of how people who stop learning die intellectually, and live lives devoid of mental growth and achievement. What a challenge to those of us in the adult education field to keep everyone on the learning route "forever." [9]

INTRODUCTION

The older adult, returning to a college campus for the first time in 40 years, has had to have the courage of a Christopher Columbus embarking on a voyage to the New World. Something wonderful was out there, but there were few good maps available for the mature matriculant adrift in a sea of youthful faces.

Colleges and universities have appropriately revolved around the educational, social, and psychological needs of young adults in their late teens and early twenties. Fraternities, sororities, special interest clubs, and service organizations form a support system, a home away from home, where students have opportunities to make new friends. Counseling is available on campuses to help young students face problems they might encounter. Intramural sports and physical education courses offer ways to fine-tune young bodies and relieve stress. Academic counselors help students chart their way through a maze of courses appropriate for young adults. Job placement exists to help graduates find entry level positions that offer plenty of room for advancement over the long haul.

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[9] Robert B. Maxwell, President, AARP, from a speech given to the Coalition of Adult Education Organizations, Feb. 21, 1991.

As America ages, however, colleges will need to make adjustments for a changing society. Several colleges and universities are already breaking ground in finding creative ways to welcome back older students, while, at the same time, effectively maintaining a balance between the needs of the young and the needs of the old. The more creative the approach, the more the two systems complement each other.

In this chapter on formal education, several colleges will be highlighted in order to demonstrate key ingredients that make adult education programs work successfully. Many other colleges could have been included. It is only important for us to realize, however, that our colleges and universities, the highest level of our education system, are beginning to understand the value and need of lifelong learning and the warmth and wisdom of adult education.

ROSA KELLER CAMPUS WITHOUT BOUNDARIES

Touro Infirmary, The Woldenberg Center for Gerontological Studies, 1401 Foucher Street, New Orleans, Louisiana 70115–3593, (504) 286–6168

When New Orleanian Rosa Keller, an 80-year-old social activist, encouraged all accredited colleges and universities in the New Orleans area to join together to create high quality education for older adults, the resulting blend was as unique as New Orleans gumbo. This cooperative effort from eight diverse colleges and universities allowed educational opportunities that cut across religious, racial, economic, geographic, cultural, and academic lines in the city. "The Greater Metropolitan New Orleans Consortium for Educational Opportunities for Older Adults" established its headquarters at the Woldenberg Center for Gerontological Studies at Touro Infirmary, a New Orleans hospital, thus eliminating identification with any one school, and allowing for professionals from the Woldenberg Center to offer guidance in identifying the needs of older students.

The creation of the New Orleans Consortium demonstrates three key ingredients that can vitalize programs for older adult learners:

(1) an individual with ideas and enthusiasm serves as a catalyst to set the program in motion;

(2) a spirit of cooperation from existing institutions or other sources within a community provides a solid starting base; and

(3) a knowledge of and sensitivity to the needs of the older learner encourage and maintain participation.

Each educational program will reflect the character of its own particular mix of these ingredients.

One of the first acts of the New Orleans Consortium was to set up a system that could dispense information to the older adults in the community in a quick and easy manner. Mrs. Keller came up with the idea of an information clearinghouse. Now, with a single phone call, an older adult in the New Orleans area can find out what courses are available at any of the eight schools in the Consortium. The clearinghouse supplies information on special tuition rates and how to get them as well as names of "campus contacts", a staff person on each campus designated to further help older students. Even information about non-college education programs offered throughout the city is given out through the clearinghouse, which prides itself on being able to help callers interested in G.E.D.'s or Ph.D.'s.

One of the strengths of the New Orleans Consortium has been this ability to identify and eliminate potential problems from the start. The professionals at the Woldenberg Center [10] quickly pinpointed strengths and weaknesses of both adult learners and adult education programs through a series of surveys and interviews with older adults currently taking college courses. The data gathered revealed which courses older students preferred, what obstacles hindered them, why they returned to school, and whether or not they were interested in completing degrees. All the information gathered proved to be helpful in setting up an educational program to encourage older learners to come back on campus and into the classroom.

The Rosa Keller Campus Without Boundaries was developed by the Consortium to offer "sampler" courses that allow adults over 65 an opportunity to take short

[10] Howard Osofsky, M.D., Ph.D., Principal Investigator, Cameron J. Camp, Ph.D., Associate Director, and Ann M. O'Hanlon, M.S., Project Coordinator, Greater Metropolitan New Orleans Consortium for Educational Opportunities for Older Adults.

courses without the pressure of grades. Classes last 2 hours and are given once a week for 2 to 4 weeks. The topics of the initial sampler reflected the interests older students revealed in the surveys—foreign languages, history, philosophy, and computer literacy. Some of the courses offered were "History of World Religions," "Jazz: Hot to Cool," "Medical Trends of the 90's," "Introduction to Spanish," "History of Ethnic Groups in New Orleans," "Healthy Aging: Combating the Effects of Aging," and "Introduction to Computer."

In addition to offering courses that reflected the interests of the older students, the Rosa Keller Campus demonstrated a sensitivity to other needs of older adults. Even though its classrooms were located at different colleges, rooms were selected to offer easy visuals and good acoustics. Faculty members were chosen because of their interest and aptitude in working with older students. Great attention was given to ease of transportation—closeness to bus lines, distance from parking lots, accessibility to classrooms and libraries, and safety of an area. Classes were scheduled at times older students seemed to prefer. Registration was designed to offer guidance, support, and ease. This slight tinkering with the existing system created an encouraging atmosphere for older students and set up a pattern for successful participation.

Adult education has a ripple effect, like a stone thrown into water. For older students, the Rosa Keller Campus offers a place to resharpen learning skills, a springboard for reentry into the academic world, and a chance to appreciate the joy and value of a college education, possibly for the first time. Ongoing research will show if older and younger students as well as faculty members experience changes in knowledge and attitudes about aging as a result of intergenerational mixing.

The circle becomes wider as older adults who benefit from their learning experience begin to give something back to the community. This New Orleans program has already begun to expand to other levels of education and training for older adults. Recently, under the umbrella of the Consortium, the Louisiana Department of Mental Health funded a grant to train older adults to work as case management aides for emotionally disturbed children and mentally ill adults.

Those who know the project best, the researchers from the Woldenberg Center, already indicate that the circles are ever expanding and that the size of the "stone" thrown was massive:

> One of the compelling aspects of the Rosa Keller Campus courses is that all eight institutions are participating. All have offered classroom space and/or instructors. In the best spirit of cooperation, the course on History of Ethnic Groups in New Orleans will be taught by a white instructor * * * from a public university and a black instructor from a private university and will be located at a predominantly black public university. The course represents what is best about the Consortium—cooperation in the delivery of quality education for all older citizens." [11]

"MY TURN"

Kingsborough Community College, The City University of New York, 2001 Oriental Boulevard, Brooklyn, New York 11235, (718) 368-5079

The "melting pot" theory is alive and well at Kingsborough Community College in Brooklyn. In times past, early immigrants introduced their cultures to one another, preserving traditions, yet creating a new, unified America in the process. Today's pioneers, however, are groups of retirees, the first to have extended lives due to better medical care. And they are migrating to college campuses by the tens of thousands. At Kingsborough Community College, the person sitting in front of you may have had a triple bypass, while the person sitting behind you may still be dealing with acne. As students talk to each other, ask questions about assignments, and study together for tests, the young and the old become friends, and understanding and respect begin to grow. Whenever you hear the sound of laughter, another age barrier has been broken.

"MY TURN" is the special tuition-free college education program at Kingsborough Community College that encourages older adults back onto campus. The require-

[11] Ann M. O'Hanlon, Howard J. Osofsky, Cameron J. Camp, "Education across the lifespan: Contributions to the quality of life of older adults." In G.H. Pollock & S.I. Greenspan (Eds.) *The course of life*, (Vol. 7), in press.

ments for admission are simple. Students must be New York City or State residents who, by the first day of class, are 65 or older. Kingsborough's admission requirement of a high school diploma or a General Equivalency Diploma has been waived for "MY TURN" students. Once an applicant qualifies by age and residence, he or she simply pays a $25 registration fee, buys books and supplies, if needed, and becomes part of the general college student population.

The program started in 1981 with about 70 students, quickly jumped to 200, and today, about 2,000 students participate each academic year. Their backgrounds are diverse. Some have never completed elementary school, some have advanced degrees. Their goals are equally diverse. Those without a high school diploma may apply for a GED after completing 24 credits at Kingsborough. Others are working toward their third associate degree. Some simply take courses for enjoyment. "MY TURN" students may take as many or as few courses as they want, but Dr. Barbara Ginsberg, the program's director, says the average student usually takes two courses—one they're really going to study hard for, an academic course such as philosophy or history—and one that is just for fun, such as drawing, ceramics, or a self-improvement course.

The program at Kingsborough Community College shows both sensitivity to the needs of older students and respect for their capabilities. The promotional brochure, set in question and answer form, sums it up quite well:

Q. Are "MY TURN" students treated differently or separated from other students or activities?

A. Absolutely not! Aside from being given a special-for-them time for registration, "MY TURN" students are never apart—they are all an integrated part of the regular student body. Courses and classes, study and homework, assignments and tests, participation in all activities, social and cultural events, the use of all facilities (gym, library, beach, bookstore, cafeteria, learning center, etc.) are the same for all registered KCC students. When required work is satisfactorily completed, college credit is given.

Q. Is there any special assistance given to "MY TURN" students?

A. Certainly. Because most "MY TURN" students have been away from school for some time, that program includes individual counseling before and during registration. Academic counseling is available throughout the semester. As needed, such services as tutoring, study and help with learning problems, guidance, transfer to senior colleges on graduation are available. Other services include: an active "MY TURN" club; frequent rap sessions with other students in the program to discuss special problems and answer questions; lectures and forums concerning specific interests of older adults (nutrition, bereavement, work options, health, politics, volunteering, government regulations, etc.); health fairs, social gatherings, outings, workshops. All those and more are part of "MY TURN."

As "MY TURN" celebrates its first decade, Dr. Ginsberg says the program gets high marks from those who count. Older students report that they feel more vital and more alive. Many of the early group of 200 still come back for additional degrees or just for the joy of learning. Younger students report that their "senior" friends help them truly understand the value of a college education. All report on their mutual respect for each other. That's not a bad "report" card for Kingsborough Community College.

GERONTOLOGY PROGRAM

College of Public and Community Service, University of Massachusetts/Boston, Downtown Center, Boston, Massachusetts 02125, (617) 287-7330

"Don't confuse age with ability."

This quote headlines the pamphlet from the Gerontology Program at UMass/Boston and sets the tone for a program developed to prepare individuals over 60 to serve as professionals in the field of gerontology.

And, who better to care for the elderly than educated elders? The program's student handbook says it best: "* * * with specialized training in social policy, active older people can significantly improve the quality of life for the state's older Americans. That is, the solutions to aging with dignity rest in the ability of older people to shape their own destinies." [12]

[12] *Gerontology Students' Handbook*, p. 1.

Indeed, the 404 graduates of the Gerontology Program are shaping destinies—their own and those of other older adults—with vigor. Graduates have gone on to jobs as diverse as working at the Massachusetts Department of Elder Affairs, directing a nursing home, leading a campaign drive for a gubernatorial candidate, working for a State legislator, providing effective leadership of a home care board, and administering programs for elders. The career aspect of this program coupled with a rigorous but innovative educational approach called "competency-based education" gives the Gerontology Program at UMass/Boston a character all its own.

Competency-based education simply means that students demonstrate specific prescribed skills in order to earn college credits. This system works well for older mature learners who are comfortable demonstrating the concepts they have learned. For some, action-oriented tasks may be harder than traditional coursework, but it eliminates the pressure of grading while allowing for rigorous testing of intellectual and technical competence. Students receive a State Certificate in Gerontology after completing two terms of intensive study, an equivalent of 30 undergraduate hours.

The State of Massachusetts benefits as well from these student endeavors. Gerontology Program students contribute to published reports that deal with issues of importance to the elderly, such as *A Nursing Home * * * Not For My Folks!* (a study based on extended interviews by students with 68 families who are caring for aged relatives in their own homes with little or no public financial or social assistance). Students have investigated the effects of rising energy costs on older people, researched patient satisfaction with services from home care agencies, and studied the experiences of families who recently placed an elder in a nursing home. They work closely with members of the State legislature and other key decisionmakers, learning from them and at the same time expressing the real needs of the elderly to those in power.

Allowing mature students to participate in action-oriented educational opportunities that would benefit the State was the result of suggestions from the Massachusetts Association of Older Americans, a major statewide self-help organization. From the start of the Gerontology Program, MAOA and UMass/Boston cooperated to

set "ground rules" that would make best use of students' strengths while being sensitive to special needs of seniors. There are no evening classes. Courses are scheduled so that students need to be at the college only one time per week. Classes are held in buildings with easy access, located near mass transit. Tuition is waived for students over 60. UMass/Boston provides tutoring services and administrative assistance to students returning to school after long absences.

When thought is given to making it convenient to enter a program, to learn from a program, and to benefit from a program, the results are successful on a number of levels. Dr. Scott Bass, Director of the Gerontology Program and Institute, and Robert Morris, Lecturer in Gerontology at UMass/Boston, describe the success of the program in terms of its growth, its workability within the university, and its ability to offer educational opportunities to students from varied backgrounds:

> The program has grown during a five year period, with the university providing only modest faculty time * * * and without large external funding * * *. The ages of students have ranged from 22 to 81 years, but the average has been 67 years; all but five had a high school education or study in a vocational or technical school. Only a third had college degrees * * *. We have deliberately sought diversity in age, background, previous education, and ethnicity in our admission policies and we have found that students with only primary or high school educations are as able to acquire complicated new competencies as those with college educations.[13]

[13] Robert Morris and Scott A. Bass, "The Elderly As Surplus People: Is There a Role for Higher Education?, *The Gerontologist*, Vol. 26, No. 1, 1986, p. 16.

We have described the impact of adult education in terms of the ripple effect of a stone thrown into water. Another "rock" analogy may now be just as appropriate. The students' handbook describes the Gerontology Program at UMass/Boston as a "stepping stone for many talented people concerned about the elderly." Solid societies, especially aging societies, may well be built of such stones.[14]

[14] The Gerontology Program has been the subject of a case study prepared by ICF, Inc., on behalf of The Commonwealth Fund of New York.

Chapter 3

INFORMAL EDUCATION

When I was young, I was amazed at Plutarch's statement that the elder Cato began at the age of 80 to learn Greek. I am amazed no longer. Old age is ready to undertake the tasks that youth shirked because they would take too long.[15]—SOMERSET MAUGHAM.

INTRODUCTION

This chapter on informal learning is more like a tossed salad than a pie crust: a pie crust needs to be perfectly prepared, with all ingredients exact, to taste right; with a tossed salad, however, you just keep adding ingredients until it looks good, and, although the result may be different every time, it will still be delicious. The number and variety of informal learning programs are so great that a general survey can never be complete. Something will always be left out. The view presented here will be just a "taste" of what's going on in America in informal learning programs for older adults.

However, a recurrent theme runs through all these programs, whether it is the Institute for Learning in Retirement at Harvard University or "The Talk Show" at the Siouxland Senior Center in Iowa: older people have a tremendous desire to learn. These "non-traditional" learning programs are actually creative learning experiments that people have invented so that older adults could have an appropriate and meaningful learning experience. The need and value of lifelong learning will be most evident in this chapter. Informal learning programs best reveal the depth and breath of the vitality, creativity, and productivity of older Americans.

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[15] As quoted by Harold Helfer, "Old Age Highs, Lows," *The Washington Times*, June 28, 1983.

CHEROKEE NATION OF OKLAHOMA

Adult Education Program, P.O. Box 948, Tahlequah, Oklahoma 74465, Reva Reyes, Project Director, (918) 456-0671, (918) 458-0484

One day, in a rural Oklahoma community called Rocky Mountain, rain came pouring down and water covered the roads. Rocky Mountain community may still have some houses with no indoor plumbing, but it also has adult education classes. Reva Reyes, Project Director for the program, says the adult students who attend classes voluntarily, on their own time, evaluate a program by "voting with their feet." If instruction feels good and meets needs, students participate. If it doesn't, students leave. On that rainy night in Adair County, Oklahoma, two Native American women, who lived quite a distance away, did make it to class on time—by walking over a mountain to get there.

The Cherokee Nation of Oklahoma offers adult education programs for ABE (literacy) and GED (high school equivalency) for Native Americans from the 14 counties under the original tribal jurisdiction. The unique aspects of the program—a staff trained to understand the needs of the older Native American adult learner, a method of teaching that builds confidence as well as vocabulary, and a record-keeping system that enables every student to succeed—are intricately woven together to create a rewarding learning environment. As the weaving of baskets gives students a way to preserve a valued heritage, the weaving of learning components gives them an academic heritage.

Staff development is the first component. Teachers for the programs are trained for many tasks. They must first find out if a community wants classes by visiting homes, talking to community leaders, attending events, and being where the people are. They ask potential students to let them know what hours and days would be best for classes, and they find out what social services might be needed. Eyeglasses and hearing aids are provided, and transportation and medical screenings are arranged. Teachers become advocates for the needs of people who live in these isolated regions, helping with everything from income tax preparation to matching up people who need wood for stoves with programs that provide it. The teachers and the program are there to

aid the older adult student to improve every aspect of life.

The method of teaching is geared to the needs and priorities of the older adult learner who is also Native American. Time is a precious commodity, so students write directly into workbooks instead of copying materials. They work at their own pace while instructors move from student to student giving whatever individual instruction is necessary. In addition to ABE and GED courses, students are offered mini-courses on Cherokee literacy (reading and writing the Cherokee language invented by Sequoyah), tribal history, the art of basket weaving, beading, and other areas of interest such as voter registration. The blending of academics with cultural activities motivates students to learn, to have pride in one's heritage, and to become better citizens.

Perhaps the most unique aspect of the program is the record-keeping system. Beginning students, given diagnostic sheets, are urged not to guess at any answers, as the purpose is simply to find out which books and materials are appropriate, not to grade student performance. From this point on, progress is recorded on a master skills checklist—skills already mastered are marked, and the student can easily see which skills will be studied next. As each skill is mastered, the checklist is marked, and when students near the level at which the GED tests are taken, a practice exam is taken. This system seems to eliminate test anxiety throughout the entire learning process and to increase self confidence by allowing students to feel good about the material they have learned each day in class, a sort of instant positive reinforcement on a regular basis. Ms. Reyes says it best: "As students see the skills mount up on the sheets, they have a sense of pride in their learning ability and control over their learning process." Because the skills sheet is a highly detailed and individualized curriculum guide prescribing precisely what is to be taught and in what order, teachers do not have to waste time planning lessons. Skills sheets can be correlated with grade levels, if needed.

The Cherokee Nation of Oklahoma Adult Education Program offers a learning experience where everyone succeeds and no one fails. For the older adult participants, just getting a GED is not the point. This is a personal choice for learning that is made by many: grand-

parents who want to be better role models for the grandchildren they care for; men who had to work when they were boys and couldn't go to school; women who grew up in isolated areas that had no schools. According to Reva Reyes, kids may not know what it's all for, but these Native American older adult students appreciate the joy and value of an education.

ELDERHOSTEL

75 Federal Street, Boston, Massachusetts 02110

Being 60 in America means you are finally old enough for entry into Elderhostel, and Elderhostel means studying glaciers while in Alaska, astronomy in San Francisco, natural photography in Colorado, archeology in Hawaii, dulcimer playing in Kentucky, and Mozart in New York. For many older Americans, this is the adventure of a lifetime. In 1990 alone, about 215,000 people participated in this educational program; 230,000 are expected in 1991.

The Elderhostel program is remarkable not only for the large number of people it serves and the variety of courses it offers, but also for the spirit of cooperation it fosters among educational and cultural institutions in the United States, Canada, and over 40 countries overseas. Since the program began in 1975, over 1,500 colleges, universities, museums, and environmental educational centers have joined together to provide a network that offers low-cost, short-term, residential academic programs for adults 60 and over. The programs in the United States and Canada usually last 1 week, programs abroad 2 to 3 weeks. Hostelers literally "go back to school" for that period of time. They live in dormitories, eat at the cafeteria, take up to three specially designed courses, and participate in extracurricular activities, field trips, and cultural events. Elderhostel is simply college in a more compact form, modified to meet the needs and interests of the mature.

At a growth rate of 15 to 25 percent since 1986, Elderhostel continues to offer older adults education mixed with excitement. A catalogue of courses abroad is published three times a year, and the destinations and types of courses offered are dazzling. You can travel to Australia to study gold mining, aboriginal culture, or the Great Barrier Reef. You can study jungle ecology

while in Brazil, Alexander the Great in Greece, marine and environmental science in Bermuda, or French art at the Louvre Museum.

Catalogues of courses in the United States and Canada are published four times each year. What follows is an extremely small sample from the Spring 1991 United States/Canada catalogue, but glancing over these course offerings is perhaps the best way to catch the Elderhostel spirit. It has been said that education plus experience equals wisdom. Adding adventure to that equation must equal Elderhostel.

SAMPLE PROGRAMS (SUMMER 1991)

Denali National Park (AK)

Denali National Park, location of Mt. McKinley, North America's highest summit, was established in 1917 primarily to protect the large mammals of this subarctic wilderness. The region provides an ideal setting to explore and study the natural history of the Alaska Range. Class sessions include lectures, slide presentations and guided walks. Accommodations are in 2-room cabins with shared bathrooms on the banks of the Nenana River adjoining the Park boundary.

—The Wildlife of Denali
—The Natural History of Denali
—The History and Management of Denali
—Glaciers and Glacial Geology

Mercer University/Jekyll Island (GA)

Sweeping sands, soaring shore birds, golden marshes and the ocean's lure enhance a visit to this serene state park where, at summer's end, the outdoors still beckons. Live and attend classes in an oceanside motel; explore further, through side trips, Jekyll's unique history and ecology. Outdoor pool on premises, walking, optional golf, tennis, biking nearby. Mercer University/Macon arranges the program; Jekyll Island provides the ambiance. Located 10 miles from I–95; all rooms double occupancy with private baths.

—World War II in Perspective
—Shakespeare: The Man, The Myth, The Mystique
—A Century in the Life of Jekyll Island
—Emily Dickinson: Person and Poet
—An Introduction to Philosophical Ethics

—The *Canterbury* Pilgrims
—Dynamics of the Barrier Islands
—Dialects
—Shakespeare's Sonnets

San Francisco State University (CA)

San Francisco State University's lodgings are new! This summer we occupy the university's just-opened conference center, which boasts one- and two-bedroom apartments with private baths and lounges. Our urban campus is located in a park-like setting with moderately graded paths providing access between residences and lecture halls. The campus is not far from the ocean; cooling summer breezes and our romantic fog are summer regulars. Excellent public transportation to all parts of the city and beyond.

—The Pacific Rim: Thé Shifting Center of World Power
—Understanding Modern Art
—The City that Tourists Don't Know
—Gandhi's Hand: Which Way Is It Pointing?
—Hidden from Art History: Why Have There Been No Great Women Artists?
—The Art of Comedy
—Detecting in San Francisco
—Exploring the World of the Conductor
—Recreations in Astronomy

Lyman Museum and Mission House (HI)

Located on Hawaii Island in the city of Hilo, experience the Museum's unique collections and Mission House. Explore this tropical paradise known for its beautiful orchids and anthuriums, lush vegetation, diverse climate, active volcanoes and charming *Aloha* spirit. Learn the story of Hawaii, its island and its people in programs filled with informative tours, dynamic lecturers, optional activities and a Hawaiian luau. Double accommodations at one of Hilo's ocean-view hotels, with a swimming pool and a garden setting.

—Religion and the Peoples of Hawaii
—Hawaii's Sugar Story
—Museum Favorites
—Hawaii's Changing Environment
—Hawaii's Diversified Agriculture
—Museum Specialties

—Hawaiian Culture Through Archeology
—The Sea and Its Products
—Museum Favorites and Tours

Fordham University (NY)

Fordham University's Rose Hill Campus is located between the New York Botanical Gardens and the Bronx Zoological Park in the Bronx. The campus, with 90 acres of beautiful lawns and trees, is accessible by public transportation (bus, subway, and train) and by car (off US I87 and I95). Dorms feature private baths and elevator-access. Lombardi Center offers a pool, tennis, squash and handball courts, a track, a nautilus center, and saunas.

—W.A. Mozart: Musical Genius
—A Many Splendored Thing: The Concept of Love in Literature
—Religion and Culture in New York City
—The Other Great Communicators
—New York's Art: The Frick Collection
—Art in America

Morehead State University (KY)

Morehead, 65 miles from Lexington, combines the traditional and the contemporary in an imposing array of modern physical facilities set against the natural backdrop of the heart of the Daniel Boone National Forest. Appalachia and Appalachians provide a natural setting for study of a unique segment of our population. Participants will be housed in an air-conditioned suite of rooms with private bath and entrance.

—Appalachian Heritage and History
—The Mountain Voice
—Traditional Mountain Dancing
—Dulcimer Playing
—Kentucky Ballads

Mystic Seaport Museum/Schooner Harvey Gamage

Mystic Seaport is one of the world's leading maritime museums. The *Harvey Gamage* is a 95′ schooner that is frequently used for educational programming. Twenty-four Elderhostelers and 7 crew sleep in bunkbed-style berths in cabins accommodating 2–4. Hostelers should be comfortable with climbing stairs and ladders and be prepared for physical activity. A day's visit at the

museum will be followed by the schooner's cruise, under sail, mooring in historic New England ports each night.

—Maritime New England
—The Voice of the Seafarer
—Coastwise Navigation

University of Arizona/Nogales

Nogales is the gateway to Old Mexico, land of charm, beauty and culture. This off-campus program is located in Nogales, one mile north of its twin city Nogales, Sonora, Mexico. Housing, meals and classes are based in a hotel with private bathrooms. At an elevation of 3,865 feet, the days are warm and the nights are comfortable. Field trips include art colonies, historical sites, and old Mexico.

—Birds of Southeastern Arizona: The Mexican Influence
—More than Machismo: A Study of Mexican Culture
—Spanish for Travelers
—Hands Across the Border: Culture
—Hands Across the Border: Heritage

LEIF

Learning English Through Intergenerational Friendship, Temple University, Institute on Aging, Center for Intergenerational Learning, University Services Building (083-40), Philadelphia, Pennsylvania 19122, (215) 787-3212/787-6970

Since 1975, more than a million refugees and immigrants have crossed our shores and borders seeking the American dream—to live in a free society where each person has the opportunity to better his condition. The fulfillment of that dream lies in education, but programs for refugees have traditionally offered educational opportunities for youngsters and young and middle-age adults. What of elderly refugees who face both the loss of home and culture and the changes of growing old? Many remain in their homes, caring for the younger children, becoming more and more isolated, and eventually depending on younger family members for translating, problem solving, and surviving. When such a role reversal takes place, and the wise elder becomes

"the child," a new stress is added to a family already handling too many changes.[16]

The American dream is not a promise, it is opportunity and it is hope. Project LEIF—Learning English Through Intergenerational Friendship—is a program that offers hope to elderly refugees. Founded in 1985 by the Center for Intergenerational Learning at Temple University, LEIF trains college-age volunteers to teach English to older immigrants and refugees. Volunteer training is critical to the success of the program, and that training includes learning about the native cultures of the students, acquiring techniques for teaching both literate and nonliterate students, and using oral history, games, humor, and music as bridges for teaching reading and writing. The older students often begin their weekly lessons at learning centers, giving them a chance to leave their homes and venture out into the world. Other lessons may take place in the student's home, allowing the young adult teacher to learn more about the life of the elder student. Lessons are practical, focusing on speaking skills that help the refugees make friends with their neighbors and deal with everyday situations. Social events, such as potluck suppers and field trips for tutors, students, and their families, expand the world of the elderly refugee even more.

Dr. Nancy Henkin, Executive Director of the Center for Intergenerational Learning, and Gail Weinstein-Shr, former director of Project LEIF, paint a poignant picture:

> * * * it is the small successes that give the program real meaning. One elder went to the post office with his tutor, and then tried it by himself for the first time. Another elder now answers the phone with a cheerful "hello" rather than picking up the phone in confused silence or not answering at all. Tutors tell happily of the delicious food and warm reception that they are given when they make their weekly visits. One tutor's family gave her student's

[16] Gail Weinstein-Shr, "Family and Intergenerational Literacy in Multilingual Families," *NCLE Q & A*, Center for Applied Linguistics, Aug. 1990, pp. 7-12.

> family a Christmas tree and the two families decorated it together. The stories go on.[17]

In the past 5 years, Project LEIF has brought together over 600 elders and students. The program is definitely a "win-win" situation. In the Logan area of Philadelphia, older refugees from Southeast Asia, China, and Latin America begin to share in the American dream through education. College students learn about a different culture through caring and responsible citizenship. This mix of youth and age, foreigner and American, teacher and student blend together, resulting in that intangible quality that makes the diversity of America work.

LEARNING-IN-RETIREMENT CENTERS/ INSTITUTES

"Learning-in-retirement centers" and "institutes" are learning centers within a college or university that offer programs selected, attended, and often taught by its older adult members.

The New School for Social Research in New York established the first program of this type in 1962, calling it the "Institute for Retired Professionals." The University of California at Berkeley followed in 1973, and today, there are approximately 100 such learning centers in the United States. The Institute movement is continuing to grow at a rapid pace.

Milton Stern, Dean, University Extension, University of California, Berkeley, sums up the reasons for such momentum:

> As is so frequently the case when, like the FAX machine, something is useful and attractive, it is rapidly snapped up by Americans, and so it is with organizations for Learning in Retirement (LIRs). They are coming along one a week these days on campuses of larger universities, liberal arts colleges and community colleges. Some of them are quite large. All of them seem to be characterized by energetic leadership, frequently retired educators or professionals, who themselves feel the need for in-

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[17] Nancy Z. Henkin and Gail Weinstein-Shr, "College Students Tutor Older Refugees in English," *Aging*, No. 359, 1989, p. 19.

tellectual contacts of which they have been deprived by being put out to grass.

It's easy to get sentimental about LIRs, but to my way of thinking, they can be seen, not as organizations for lonely hearts, but for lonely minds, and that, at least, is the way we have looked at them. While I am a supporter of inter-generational education, I also believe firmly that, just as teenagers have their own age group cadres, so older people need a place to call their own, in which they can live up to their potential.

Institutes and learning-in-retirement centers may have similar characteristics, but each is unique, reflecting the creativity of its membership.

DUKE INSTITUTE FOR LEARNING IN RETIREMENT

The Duke Institute for Learning in Retirement * * * is a year-round educational community on the Duke campus—a place where men and women, 50 and older, can enjoy daytime courses, good conversation, and the companionship of peers in a stimulating and congenial atmosphere. * * * Members teach classes, lead study circles, serve on the Board and its committees, act as class assistants, help with the record keeping, make the coffee, and perform other tasks, large and small. * * *

Most classes last 12 weeks and meet once a week for 1½ hours * * * DILR teachers are a mixture of peer members, Duke professors, Ph.D. candidates, independent scholars, and community experts * * *. Class participation ranges from researching and presenting papers for study circles to simply enjoying lecture series.[18]

Members have access to the Duke libraries, swimming pools, language labs, and faculty dining room. They may audit university courses at 10 percent of the university course fee and with the permission of the professor, and they may participate in Alumni Travel tours.

[18] Description from the *Duke Institute for Learning in Retirement Winter 1991 Handbook*, pp. 2-3.

A sample of DILR courses includes specialties such as Duke Forest Walks and Lunchtime Language Tables and courses such as "The Gift of Laughter," "American Art," "Great Decisions 1991" (eight of the most significant world issues the United States will confront in 1991), "World War II: Its History and First-Hand Accounts of Those Who Were There," and "Italian the Easy Way."

Harvard Institute for Learning in Retirement

The Harvard Institute for Learning in Retirement offers courses as diverse as "Fairy Tales," "Physical Geography," "Superpowers in the Middle East," "Legal Issues—Constitutional and Otherwise," and "Creativity and Disease: How Illness Affects the Arts."

Plato Society

The Plato Society (University of California at Los Angeles), in addition to offering courses, helps with organizing carpools and plans whale watching trips. The Colloquium, a series of biweekly meetings which brings together the entire membership of the Society, selects prestigious lecturers drawn from the resources of the University. Plato Society retreats, held between terms in an off-campus residential setting, provide an intense learning experience and an opportunity for deepened acquaintance with several dozen fellow members.

Academy of Lifelong Learning

The Academy of Lifelong Learning (University of Delaware) offers over 100 courses each semester to its 1,200 members. All courses are peer-taught. The Academy has an outreach program, with about 160 programs offered at retirement centers and nursing homes.

North Carolina Center for Creative Retirement

The North Carolina Center for Creative Retirement (University of North Carolina at Asheville) under the direction of Dr. Ronald Manheimer has fairly exploded with programs and services, almost redefining the concept of an institute. What is unique about the Center is its dual emphasis on life enrichment and community service.

The *College for Seniors* gives adults 55 and over the opportunity to come to the UNCA campus to take liberal arts courses in a peer-led teaching and learning program. There are no exams and no grades, and courses are as varied as "Ceramics—an Artistic Opportunity," "One Hundred Decisive Events in History," "Warriors, Kings, Saints, and Scholars—The Greats of Medieval England," and "Understanding South Americans, Their Politics and Their Problems." A social support system complements academic studies: brown bag lunches with a UNCA political science professor before a presidential election, trips to art exhibits, dessert and group tickets to a campus play.

The *Senior Academy for Intergenerational Learning* (SAIL) matches retired civic and professional leaders with undergraduate students and UNCA faculty to work together on learning projects.

The SAIL "Senior Fellows" volunteer their time and share their expertise with the undergraduates. Retired physicians serve as mentors to premedical students, university athletes are matched with senior adults who share career interests, and computer-wise retirees work with computer science students on projects to benefit UNCA. "Senior Fellows" serve as guest lecturers and research consultants at the request of faculty. Though retired, these volunteers continue to contribute to their professions and their community through SAIL.

Leadership Asheville Seniors (LAS) are given an intensive learning experience that gives them an overview of the needs of the region. After completing LAS training, these volunteers can choose a volunteer activity that offers them both satisfaction and use of their past experience. The training program for LAS participants is three-fold: political leaders, agency heads, and civic leaders share indepth community information through lectures and problem-solving sessions; LAS participants take part in activities to improve their leadership skills; and they participate in actual case studies concerning agencies or issues and report their findings.

Life Journey groups are outreach humanities programs that offer reading and group discussion led by trained volunteers at various sites, such as churches and community centers, in rural counties in western North Carolina. Subjects have included "Great Ideas, Ancient and Modern, That Changed the World," and

"The Two World Wars, Roaring Twenties, and Great Depression." Other humanities programs offered by the Center are those led by paid, trained scholars through a grant from the National Endowment for the Humanities. Entitled "The Carolina Special—Railroads through the Carolinas and Beyond as Reflected in Literature and History," these programs extend across four states—North Carolina, South Carolina, Tennessee, and Virginia. Public libraries become the local cosponsor.

The *Senior Wellness Program* includes a 16-hour course, and graduates of the course can become Wellness Ambassadors, helping with *Senior Wellness Day*, an annual spring event cosponsored with a local hospital that is a day-long series of workshops and screenings. Two mall-walking programs, again with hospital cooperation, offer early morning mall programs that address topics related to fitness.

A *Retirement Planning Program* offers corporations and individuals retirement seminars. The *Research Institute* studies the economic and social impact of in-migrating retirees in the region as well as other topics appropriate to the older adult.

Perhaps the brochure from the North Carolina Center for Creative Retirement entitled "Discover the Possibilities" says it best: "The North Carolina Center for Creative Retirement is a laboratory for the state and the nation. The Center's mission is to develop innovative model programs in community leadership, volunteerism, technology transfer, retirement planning, peer learning and teaching, health promotion, product assessment * * * in short, the broad spectrum of opportunities and issues that help enrich the lives of retirement-age people and, in fact, benefit Americans of all generations."

ORGANIZATIONS

Francis Meyers, President, ALIROW, 1607 Angelus Avenue, Los Angeles, CA 90026.

Ronald Manheimer, Director, Center for Creative Retirement, University of North Carolina—Asheville, Asheville, NC 28804-3299.

James Verschueren, Elderhostel Institute Network, 75 Federal Street, Boston, MA 02110-1941.

POETRY PROGRAM

St. Francis House Adult Day Health Care, Our Lady of the Lake Regional Medical Center, 4735 Perkins Road, Baton Rouge, Louisiana 70808

> (She) even began to carry a folder of her poetry, informing us that her grandchildren were very excited to hear the poems that she had been writing each week. * * * (She) spent a weekend composing, on her own, several poems and a short story about Halloween which were read at the * * * Halloween party.[19]

This description of a creative woman belies the picture most of us hold of an elderly woman suffering from short-term memory loss and depression. But Dr. Fredda Blanchard-Fields believes in the power of the frail elderly: "The goal of each of the projects we develop is to assume that, (regardless) of the severity of the dementia, there is always something left." If caregivers underestimate a client's competency and treat him or her accordingly, an elderly person may feel and act even more helpless. Although some impairments are due to disease, others may be due to lack of motivation or lack of encouraging surroundings.

Dr. Blanchard-Fields directs the development of poetry and art programs at the St. Francis House Adult Day Health Care. The adults at St. Francis range from physically disabled, alert adults to adults with mild to severe dementia. Programs focus on developing an individual's potential (what a person can still do) and on increasing the individual's feeling of control.

Shannon Triche, an undergraduate psychology major, developed and implemented the poetry program under Dr. Blanchard-Fields' direction.[20] The purpose of the poetry program is simply to make poetry writing possible, relying on the poet's own experience and inspiration. Poetry is explained as a pure expression of feelings. Rhyming is not necessary, and, in almost all cases, clients dictate their poems. This not only removes pres-

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[19] Description provided by Dr. Fredda Blanchard-Fields, Associate Professor of Psychology, Department of Psychology, Louisiana State University.

[20] The program is based on the methods and ideas from a book by Kenneth Koch, *I Never Told Anybody* (Random House, New York, 1977).

sure for those with limited education or poor memories but also allows time for encouragement and help with the writing process, giving clients confidence in themselves and their ability to write poetry. The poets range in age from 20 years to 93, with the average age being 70. Classes are held weekly, and beverages are served. Poets are never forced to share their poetry with others; writing is for the pleasure of self-expression. The overwhelmingly positive feedback from coordinators and other client-poets encourages writers to allow their poems to be shared. The following quotes are taken directly from program descriptions.

Class One: Childhood Memories. "We asked clients to first think about the place they were born. Then to think about what they remembered most about that place; what kind of house they lived in; * * * etc. This first poem was more of a narrative than a poem, but we felt that it was important to simply get something on paper so that the clients could immediately see results. There was much reminiscing and clients were encouraged by the positive feedback from the other members of the group when the poem was read aloud."

Class Two: Colors. "For the poems about colors, we suggested that the clients think about their favorite color. Then think about what that color reminded them of: a place, a feeling, a season, etc. * * * in some cases, it was difficult to keep the clients focused on the subject."

Class Three: Quiet. "For the class on 'quiet,' we prompted the clients to write about the quietest things or times they could think of * * * Less prompting was required this time, and the clients seemed more focused. * * *

Class Four: Music. "For the 'music' poems, we played a cassette tape of Harry Connick, Jr., a New Orleans Musician. We requested that the clients listen to the music for a few moments, and then write about how the music made them feel, or what it reminded them of. It was during this class that some of the clients began to inject humor into their poems. * * *

Class Five: I, the Ocean. "For class #5, we tried something a little different. We played an album of ocean sounds * * * and explained that, for this poem, we would be writing as though we * * * were the ocean. * * *"

After five classes, clients feel comfortable enough with writing to enjoy more flexibility. They begin to come up with ideas of their own. Frail elders, initially shy and withdrawn, now delight in hearing their poems read aloud to the entire day care center, enjoying the positive, complimentary feedback. Some even take it upon themselves to encourage nonparticipants to try at least one class. The poem that follows is a result of the poetry class, although the goal was the process rather than the product:

Grandfather

It is a peaceful evening.
The dinner bell rings. I'm walking along the hall, and I see Grandmother.
She tells me to stay upstairs with Grandfather
While the rest of the family eats.
Grandmother doesn't want him to be alone.
I am very happy.
I enter the room.
He asks for his hairbrush in his usually demanding way.
Laughing on my way to his dressing room, I tell him, "Your hair looks fine."
He has such beautiful white hair.
I brush his hair, and as I turn to replace the brush, he demands,
"I told you to brush my hair."
I look at him and watch as he slumps in the chair.
I place my hand on his forehead
And I realize sub-consciously, he is dead.
I call downstairs.
The family rushes to the bedroom.
As my uncle places him gently in the bed,
I suddenly realize
How inadequate we all are.

SENIORNET

399 Arguello Boulevard, San Francisco, California 94118, (415) 750-5030

According to President Bush, broccoli may be out but computers are in. The April 25, 1991, edition of *The Washington Post* reports that President Bush is learn-

ing how to use a computer and that Mrs. Bush is already computer literate and travels with a laptop.

The Bushes are part of a movement that Mary Furlong set into motion in 1986 when she started teaching computer skills to older adults as a research project. Today's older Americans want to be computer literate, and Mary Furlong's research project has evolved into SeniorNet, a nonprofit organization [21] that consists of 41 SeniorNet learning centers where classes in word processing, database management, spreadsheets, and telecommunications are taught. Over 12,000 members (including independent members who are not near learning centers and who use their own computers and modems) have gained computer knowledge through SeniorNet, and many are linked together by a national online computer network that enables them to communicate with one another.

SeniorNet works with local sponsors to organize learning centers where older adults can learn about using computers and meet other people with similar interests. The learning centers are run by volunteers, seniors who have computer skills and are willing to share them. Francisca Middleton, in a speech presented at an AARP Conference on Resourceful Aging in 1990, stated an overlooked benefit of the program: "We feel that we are breaking down stereotypes about older adults and their involvement, or lack of involvement, with technology. First of all, there are seniors out there who do have these skills. Secondly, and probably the most startling of all to many people, there is a real hunger among seniors for learning about this new technology that came about long after they were in school, and even after many of us retired from the business world. Every one of our sites has a long waiting list of people eager for classes."

As demographics in America change, old patterns break down and new patterns emerge. Learning about computers represents more to older Americans than spreadsheets and databases. Ms. Middleton describes the SeniorNet computer network as an "un-geographic community" where people hold private conversations,

[21] The Markle Foundation has provided initial and ongoing core support for this nonprofit organization.

make public statements, and participate in forums, just like in any other community.

Lifelong learning may be most evident as Americans, through the modem and the mouse, use modern day technology from childhood to old age to learn and to have fun and to communicate. Could computer-ese be our new intergenerational language?

SHEPHERD'S CENTERS OF AMERICA

6700 Troost, Suite 616, Kansas City, Missouri 64131, (816) 523-1080

Dr. Lydia Brontë has described the "new" old age as a time for growing "out" as well as growing up, and the elders who attend Shepherd's Centers certainly exemplify this attitude toward aging. These participants are not passive recipients. They welcome responsibility for themselves and for others. They socialize so they won't be lonely, they learn so they won't be left behind, and they reach out to other elders who need their help. They know that they are the first generation of elders in the United States to have enough power to make changes that will influence the next century. Thus, the goal of Shepherd's Centers is to help older adults develop leadership skills and extend their independence in order to better serve themselves and others.

The original Shepherd's Center began in 1972 with six volunteers and seven participants. Today, there are 95 Shepherd's Centers in 25 States, making up a network of 15,000 volunteers serving 175,000 older adults. Empowering older adults to help themselves and to help others is a concept that obviously works well.

All Shepherd's Centers are founded on principal characteristics:

1. Older people are seen as a potential resource rather than as a social problem.
2. Responsibility for their lives and the development of programs for their peers and community is vested in older adults themselves.
3. The center acts as a voluntary watchful presence in the community, showing concern about all older people.
4. Financial support comes from the private sector, especially from congregations, businesses and foundations—but not from government. Partici-

pants themselves contribute from 30 percent to 60 percent of the cost of operating a center.

5. A Shepherd's Center is cost-effective; it uses church and synagogue space for its offices and delivery of programs, and is staffed by peer volunteers.[22]

Adventures in Learning is the educational aspect of every Shepherd's Center. Older adults are both teachers and students, planners and participants. Classes are usually once a week. There are few rules regarding class attendance and participation, and there are no tests, no grades, and no academic credits. Classes are usually held during the day and are organized on an academic semester or quarterly basis. Fees are easily affordable, ranging from free to $15.00 for a full quarter of classes. Adventures in Learning is usually held in a building that is underutilized during the week. Much thought is given to the convenience of the location, the building, and the willingness of the institution to provide services. A "Noon Forum" is offered in many centers as a time when all students, teachers, and volunteers come together to share a meal and friendship.

Dr. Elizabeth Welch gives a good description of the program at the Shepherd's Center of Greater Winston-Salem, North Carolina:

> We in the Winston-Salem Shepherd's Center offer nine classes during the day to meet individual interests and needs. The variety of choices encompasses the humanities: religion, art, music, dance, hobbies, and creative writing. Health in its many aspects, caregiving, substance abuse, small group discussions, and environmental stewardship classes are also popular. Consumer education, financial planning, legal "know-how", social security, insurance, and local, state, and federal legislation are frequently offered. Other well-attended classes include travel, genealogy, local history, current affairs, and second careers. Outstanding community leaders teach these courses as a community service for the twice-a-year, eight-week

[22] *Meeting the Challenge and Opportunity of an Aging Society*, prepared by the Shepherd's Centers of America.

sessions of the Adventures in Learning experience.

Beyond the individual classes, however, is the unique binding element in the Adventures in Learning, a session called the Core class. We offer this component when no other classes are scheduled, before the fellowship lunch so that *all* of the registered participants can attend together. The purpose of the Core class is *always* to prepare us for our responsibilities and responsiveness as citizens who, *for the next century, will be the major makers of decisions and formulators of policies* for ourselves and our country. We will determine the quality of life of our society and how it affects not only our own lives now, but the lives of generations yet to come. It is an awesome challenge, and one for which we, the older majority, must become better prepared and motivated.[23]

Dr. Welch considers today's older Americans "people of destiny." "For this role of leadership in the making we shall need all the knowledge and wisdom from our accumulated experiences. The Shepherd's Center concept with its Adventures in Learning opportunities for motivation and education become the critical answer to the demands *of this time.* * * * As informed citizens, we will be motivated to become actively involved in service to our world. And in doing so, we will be personally moving closer toward that goal of becoming what each one is potentially capable of being." [24]

THE COOPERATIVE EXTENSION SERVICE

U.S. Department of Agriculture, Room 3444 South, 14th and Independence Avenue, S.W., Washington, D.C. 20250-0900, (202) 720-2920

The 1986 National Invitational Conference on Rural Adult Postsecondary Education gives an excellent description of the difficulties faced by rural adult learners: "Rural adults report many of the same problems in continuing their education as those reported in the adult learner literature. But the common barriers of in-

[23] Elizabeth Welch, *New Roles in a New Age.*
[24] *Ibid.*

convenient class scheduling, family responsibilities, and time constraints were augmented by the rural problems of long commutes, poor road systems, bad weather, and geographic isolation." [25]

Rural adults are able to overcome some of these difficulties in finding appropriate learning sources through the services of the Cooperative Extension Service. The Cooperative Extension Service was established by Congress in 1914 as an informal educational organization. It combines the services of the U.S. Department of Agriculture (USDA), county governments, and State land-grant colleges and universities (colleges and universities authorized by Congress through the land-grant acts of 1862 and 1890).

University and USDA specialists and research scientists develop programs for the public that are passed on to Extension staffs in more than 3,000 counties throughout the country. There is feedback between these staffs and those who develop the programs so that practical educational programs meet specific local needs. Farmers can learn about agricultural weather, markets, pest control, crops and soils, livestock and poultry, farm machines and buildings, farm safety, and safe use of pesticides. Technical help is provided on how to manage natural resources, such as wildlife, fish, and forests. Other types of information are distributed to rural families who learn how to manage financial resources, how to conserve energy, how to provide good nutrition to their families, and how to develop effective parenting skills.

The Extension System relies heavily on volunteers, and there are over a million Extension homemakers and other volunteers who assist with the teaching. Educational information is presented through public meetings, demonstration projects, tours, personal visits, telephone calls, direct mailings, publications, computers, and mass media.

Listed below are a few of the programs that the Cooperative Extension Service targeted specifically toward the older population: [26]

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[25] "The Learners: From Barriers to Affirmations," Proceedings 1986, National Invitational Conference on Rural Adult Postsecondary Education, p. 9.

[26] Descriptions for Arizona, Nevada, and West Virginia are provided by Jeanne M. Priester, Extension Service, USDA, submitted Dec. 1990, for the U.S. Senate Special Committee on Aging Report.

ARIZONA continues to provide educational resources and workshops for older persons. "Analyzing Long-Term Care Insurance" is a comprehensive educational program for use by volunteers or professionals to teach older people how to analyze a policy and to aid in selecting long-term care insurance. Another teaching guide addresses critical legal issues such as "Durable Power of Attorney, Living Wills and Medical Power of Attorney."

In *NEVADA,* 200 older adults increased their ability to live independently in later years. At the workshop, they shared many ideas actually in use to make it easier and safer to live in one's own home despite temporary or permanent disabilities. One hundred and twenty older women participated in workshops on model programs to increase independence for rural elders and 42 newly widowed persons reported they were helped to deal with new responsibilities by a mail-out series "Newly Alone in Later Years." Two emerging issues which new programs will address are (1) late life planning (including living wills and addenda, funerals and alternative arrangements) and the importance of communicating these plans to family members and (2) recognition of the role of friends and neighbors as caregivers.

WEST VIRGINIA has received a grant from a private foundation to develop a model that can be replicated by Extension agents throughout the country. "Preventicare" is an educational health promotion program for older people. The 20-year-old Preventicare program has been run by a private foundation and has been available only in West Virginia. Through it, participants have adopted lifestyles that promote their health and physical well-being and their quality of life by maintaining mobility, health, vitality and independence. The donor desires to institutionalize "Preventicare" and to make it available nationwide. This challenge has been accepted by West Virginia Extension.

The Texas Agricultural Extension Service has developed a program to train older minorities to teach their peers at the nutrition sites where they gather. Extension agents work with the Nutrition Site Manager, and together they train older minority representatives to reach their peers through videotapes. True-to-life episodes show minority families working out problems, such as *high blood pressure* or *late onset diabetes* (aimed

at the black elderly) and *being overweight as a risk for high blood pressure* or *depression following widowhood* (developed for Hispanic elderly and recorded in Spanish). The minority peer educator leads a discussion following the videotape. Key points are reinforced as the group participates in the discussion and becomes actively involved in seeking solutions to the important health, nutrition and mental health problems shown in the videotapes.[27]

HUMANITIES PROGRAMS

Dr. David Shuldiner, Humanist-in-Residence for the Connecticut Department on Aging, defines humanities programs as educational programs that explore and interpret the human experience.

Whether the subject studied is history, literature, philosophy, folklore, contemporary social issues, or studies of music and the arts, Shuldiner believes that good humanities programs are those that involve participants in both lively discussions and reminiscences that can add information to the subject being discussed.

Humanities programs are indeed learning programs, but this act of learning often involves movies, trips to a museum, a visit to a local historical society, the creation of a play recreating the lives of local residents using their own words, mounting an exhibit using photographs and memorabilia, or sewing an historical quilt.

A few humanities programs are listed below, each one different, each one valuable:

New Jersey Committee for the Humanities

The New Jersey Committee for the Humanities has created several landmark humanities projects. A panel of literature scholars developed book discussion programs for use at retirement communities, senior centers, and libraries that serve the elderly. A panel of musicologists developed a music history program for nonreaders. A large-print poetry series was produced for those with eye problems. A project called "People and Stories" is aimed toward both English and Spanish-speaking seniors. The program is updated each year to appeal to new audiences.[28]

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[27] *Minority Peer Educator Project*, Texas Agricultural Extension Service.
[28] Esther Mackintosh, *Humanities Programming for Older Adults*, p. 10.

Chemetka Community College

College for Older Adults, P.O. Box 14007, Salem, Oregon 97309, (503) 399-5139

Chemetka Community College offers both "Writing Your Life Story" and "Oral History" classes for older adults. Getting a perspective on a lifetime through classes such as these serves as a valuable learning experience for people as they age. It not only seems to give a meaning to life's ups and downs but also helps the writer see directions for future growth. The classes are scheduled off-campus at senior centers, nursing homes and other sites.

The focus of the writing classes is on "getting the story out" rather than on learning grammar or improving style. Positive feedback is important to the writers, and group leaders encourage classmates to listen nonjudgmentally as each writer shares a story.

For oral history classes, the technique is different. Interviewers record individual life stories that are transcribed and read back to students for comments and changes. These stories may also be shared within a group.

There is historical significance to these particular types of humanities classes. At Chemetka, the life histories and life stories are often typed by local high school students and sometimes bound or even printed by a local press. Collections of stories written by students have been published by the college.

A text by life story instructors, "Deep Down Things: A Guide for Writing Your Life Story" is available from Chemetka Community College for $5.00.

Senior Multi-Purpose Center

Community Services Building, 6 Gauntt Place, Flemington, New Jersey 08822, (201) 788-1359

The following letter from Eileen Hodge, Supervisor of the Center's senior citizen activities, tells how a humanities program was born:

"When I became Supervisor of Senior Citizen Activities here in Hunterdon County almost five years ago there was a great deal of instruction and programming around crafts. Senior citizens could receive instruction and supervised practice in upholstering, lampshademaking, needlework, cake decorating etc. All of this was

done by volunteers. On a more formal level, there were lessons in painting with oils and watercolors and doing whatever one does with pastels.

"Believing that we offered very little intellectual stimulation, I set about trying to remedy that situation. The Center had received one grant from the Endowment for the Humanities to cover a five part literature/discussion series. Presenters were professors and instructors from various colleges and universities around the state. The books were provided to participants free of charge—also covered by the grant. Presenters were paid $150 per presentation. The grant was applied for jointly by the Parks and Recreation Department and the Senior Multi-Purpose Center—both county agencies.

"When I tried to get a similar grant the next year I was told that we were no longer eligible—that it was meant to be seed money and if we wanted to continue the program we should use local resources. And so our relationship with our community college was born. A few isolated lectures/discussions by one very willing English instructor led to a more ambitious undertaking modelled on a program the college was doing in conjunction with the Somerset County Library. (Our college serves both Somerset and Hunterdon Counties.) Elder Quest was planned by a joint committee of seniors and the Community Outreach Director from the college and myself. Many speakers were chosen from the college's speakers bureau. Others were from local agencies and institutions. *All* were volunteers.

"The outcome was wonderful. The library began expanding its programming to address *senior* concerns where formerly it had concentrated on juvenile programming. Last spring a series of lecture/discussions was sponsored jointly by the library and the Senior Multi-Purpose Center, but *funded* by the library. It was called 'Portraits of Aging in Art & Literature' and the lectures were presented by an Art History Professor from Rider College and a Humanities Professor from Trenton State. The program was so well-received that a local nursing home replicated the art parts for their clientele and opened it to the general public.

"The Parks Department has begun serious efforts to (create programs) for the senior population and also to provide supplementary transportation to events sponsored by others. Because we are a rural county, trans-

portation is a major issue for senior non-drivers, who can easily become socially isolated. The park has sponsored workshops on story-telling, sugaring, birding, etc., and Musical Events. We also call on their personnel to present programs on natural science right here at our center.

"Rutgers Cooperative Extension has been very helpful in cooperative programming providing retirement seminars, fitness seminars, speakers on horticulture, home economics and such. The Office on Aging and Cooperative Extension have jointly planned and executed a few formal programs, e.g., a multi-part Caregivers' Information Series for those caring for frail and ill elderly patients in the home. Also a seminar on Choosing a Nursing Home and a three part Pre-Retirement Seminar. We often call on Extension Personnel for individual presentations such as 'Cooking for the Heart Patient' and 'Container Gardening.'

"There are some great mini-course outlines published by AARP and requiring an appropriately qualified person from the center or a volunteer from the community to lead them. Materials are dirt cheap.

"We also call on the Historical Society, Foundations, Interest Groups, Schools, Colleges, Religious Congregations, Government bureaus, all possible community sources of educational programming. People are *wonderful* about donating their services and some are just waiting to be asked.* * *"

ORGANIZATIONS AND RESOURCES

Many organizations could be of great help to those interested in humanities programs for older adults. Esther Mackintosh has compiled "Humanities Programming for Older Adults" for the Federation of State Humanities Councils. It is an excellent resource as an overview of humanities programming. The following list of organizations is reprinted from that publication with permission:

The mission of the *National Council on the Aging* is to serve professionals who serve older adults, with senior centers as their core constituency. The organization provides training, research, information and technical assistance to those working in this field. In 1976, with a grant from the National Endowment for the Humanities, NCOA developed the first of a series of large-

print anthologies, called collectively "Self-Discovery Through the Humanities," to be used in reading and discussion groups for older adults. There are now sixteen volumes available, focusing on such themes as "The Search for Meaning," "Words and Music," "Americans and the Land," and "The Remembered Past: 1914-1945." Each volume consists of fiction, essays, and illustrations, divided into sections appropriate for individual discussion sessions. The books can be purchased from NCOA along with discussion leaders' guides, tapes, and publicity posters. Several councils have provided grants for the use of these materials, and the NCOA has increasingly relied on councils for advice about scholars in the states both to participate in programs and to help with the preparation of additional materials. For further information contact:

Sylvia Riggs Liroff, Manager of Older Adult Education, NCOA, 409 Third Street, S.W., Suite 200, Washington, D.C. 20024, (202) 479-1200

The *American Association of Retired Persons (AARP)* focuses more on practical programs than on education or enrichment. However, the Institute of Lifetime Learning with the AARP has produced a minicourse series that includes courses on 20th century poets, Southern literature, British history, and Black history. They have also produced small booklets such as "Attracting Older Americans to Museums," as well as a "Directory of Centers for Older Learners." For more information contact:

Special Project Section, AARP, 601 E Street, N.W., Washington, D.C. 20049

The *Connecticut State Department on Aging,* in collaboration with the Connecticut Humanities Council, published a 198-page handbook entitled "Humanities for Older Adults: A Guide to Resources and Program Development." The guide is the result of the work done by Humanist-in-Residence David Shuldiner, whose position in the Department on Aging was originally supported by the Connecticut council and is now a full-time staff position in the state government. For copies of the guide or for further information, write or call:

David Shuldiner, Humanist-in-Residence, State of Connecticut, Department on Aging, 175 Main Street, Hartford, Connecticut 06106, (203) 566–4810.

(A brief, generic version of this guide is available by contacting the Community Service Division at the State of Connecticut Department on Aging.)

The *Gerontological Society of America* is the professional organization for scholars, researchers, and practitioners in the field of gerontology. The multidisciplinary organization produces a journal and a variety of other publications, including "Where Do We Come From? What Are We? Where Are We Going? An Annotated Bibliography of Aging and the Humanities." For more information contact:

The Gerontological Society of America, 1275 K Street, N.W., Suite 350, Washington, D.C. 20005–4006, (202) 842–1275

The *National Association of State Units on Aging* is the national network for those agencies designated in each state to be the focal point for matters concerning older citizens. In any given state, the State Unit may be a Commission, Office, Department, Bureau or Board. The state and local agencies allocate about $1 billion of federal and state funds and "provide leadership and guidance to the various agencies and organizations serving the elderly." For a membership directory of the National Association of State Units on Aging, write the Federation office. (The address is given under the Federation of State Humanities Councils.)

The *National Library Service for the Blind and Physically Handicapped* of the Library of Congress loans out books in braille or on cassette to a network of 150 libraries around the country. Although these materials have been used in reading and discussion groups, the aim of the program is primarily recreational rather than educational.

The *North Carolina Center for Creative Retirement,* established in 1987, works to develop model programs "which link personal fulfillment with community service." The Center conducts regular humanities courses for the older adults and has recently sponsored a national workshop on humanities programs for older adults. For more information contact:

Ronald J. Manheimer, Director, North Carolina Center for Creative Retirement, UNCA, Asheville, North Carolina 28804-3299, (704) 251-6140 [29]

The *Federation of State Humanities Councils,* founded in 1977, is the membership association of the State Humanities Councils. Through its program of research, conferences, collaborative projects, and communication to members, legislators, and others on issues of public interest, it provides support for the State Humanities Councils and strives to create greater awareness of the importance of the humanities in public and private life.

Federation of State Humanities Councils, 1012 Fourteenth Street, N.W., Suite 1007, Washington, D.C. 20005, (202) 393-5400.[30]

BASIC EDUCATION PROGRAMS

There are several programs that seem to fit together under a general category of basic education services. Although available to all ages, they serve the older adult's needs quite well. The General Educational Development Tests (GED), the External Diploma Program (EDP), and English as a Second Language (ESL) will be highlighted below, along with examples of how Lane Community College in Oregon and the Texas Senior Citizen Center have put some of these programs into place.

General Educational Development Tests

American Council on Education, One Dupont Circle, N.W., Washington, D.C. 20036, (202) 939-9490

The GED Tests (Tests of General Educational Development) were developed by the American Council on Education in 1942 for returning World War II servicemen. The Tests give adults who did not graduate from high school a chance to get a high school equivalency diploma, making them qualified for college enrollment, training programs, and job advancement. For some, the reward is the satisfaction of attaining a lifelong goal. The tests, which last 7 hours and 35 minutes, are given in five areas—writing skills, social studies, science, literature and the arts, and mathematics. Candidates must write an essay as part of the Writing Skills Test. However, the focus of GED Tests is not on facts and defini-

[29] *Ibid.*, pp. 15–17.
[30] *Ibid.*

tions, but rather on knowledge and skills gained from experiences and information learned during a lifetime.

More than 24,000 adults over the age of 50 took the GED Tests in 1990. Of these, approximately 25 percent said they planned to attend a community or junior college, while another 25 percent planned to continue studying on their own. Fewer than 10 percent reported no further study plans.

Persons may prepare for the tests by reading self-study books, by watching programs on public television stations and cable channels, or by participating in classes offered in most communities. Approximately 90 percent of older adults studied to prepare for the tests, with more than half taking a formal class and 10 percent studying on their own.

The External Diploma Program

The Center for Adult Learning and Educational Credentials, American Council on Education, One Dupont Circle, N.W., Washington, D.C. 20036, (202) 939-9475

The External Diploma Program (EDP) allows mature adults to receive high school diplomas through a two-phase process. First, the adult's basic skills (reading, writing, mathematics, and entry level job skills) are evaluated, usually by a counselor on a one-to-one basis. The counselor advises the participant on the strengths and weaknesses of the skills and offers a list of established community resources that can be used for improvement. After a course of self-education, the adult returns to the EDP office for retesting.

In phase two of the program, the adult learner demonstrates competencies by undertaking tasks that are as practical as they are revealing. A student might be asked to "find" a house in a new community. This simulated task would involve the ability to interpret a lease, evaluate expenses and income, write letters of inquiry or complaint, use maps, etc. Each adult also receives credit for one individual life achievement, usually a vocation. After all the competencies are demonstrated with 100 percent mastery, there is a review by an assessment specialist, and a high school diploma is then awarded through a local school board.

The EDP allows the adult learner to be in charge of his own learning process. Other features that would

appeal to the mature adult would be the flexibility in time and location, the credit given for workplace and life achievements, and the continuous feedback that is given to program participants.

English as a Second Language

TESOL, Teachers of English to Speakers of Other Languages, Inc., 1600 Cameron Street, Suite 300, Alexandria, Virginia 22314, (703) 836-0774

English as a Second Language (ESL) is an educational program that enables non-English speaking people to speak, read, and write English at a survival level. ESL instruction is divided into four skill level classes to serve students with very different educational backgrounds. The skill levels are classified as beginning, low-intermediate, high-intermediate, and advanced. Instructors work with the students not only on language improvement but cultural orientation as well.

TESOL (Teachers of English to Speakers of Other Languages, Inc.) is a membership association that serves as a clearinghouse for those who want to know where to take ESL classes and for those who want to be trained as tutors and teachers of non-native speakers.

Lane Community College

1059 Willamette Street, Eugene, Oregon 97401-3171, (503) 726-2252

Lane Community College in Eugene, Oregon, in addition to offering educational programs throughout its college system, has a tremendous number of pre-college level alternative programs for adults.

The *Adult Basic Education* (ABE) program teaches basic skills and the application of those skills in daily life. Reading, writing, and arithmetic at beginning and intermediate levels are stressed. Literacy programs and *Adult Basic Education for Students with Special Needs* are also available. As students progress, they can go on to GED preparation programs or the Adult High School Diploma program.

The *Adult High School* (AHS) has two options: (1) a classroom-based program, a traditional system of classes, instructional activities, and assignments, and (2) the *Life Experience Assessment Program* (LEAP) that awards credits based on previous secondary education and proven skills and knowledge. A flexible program

plan allows for completion of remaining credits. Students may combine life experience credits, directed study, and course work taken through Adult High School or college credit classes to complete their diploma requirements.

English as a Second Language (ESL) classes are offered both during the day and in the evening. Each student takes an English language skill test and is placed in the appropriate class. Volunteer tutors assist students with both language skills and cultural orientation.

Texas Senior Citizen Center

The Texas Senior Citizen Center Literacy Survey (June 30, 1990) indicates that 1,500 seniors participated in literacy programs developed at 105 senior center literacy sites. Over 1,000 teachers, tutors, and volunteers used one-to-one and classroom teaching methods to teach English as a Second Language, citizenship training, and reading improvement.

Factors for the success of the program included the availability of transportation, classes held during morning hours, familiar peer settings in senior centers and nutrition sites (56 out of the 105 sites), and the financial help of the Meadows Foundation.

The Survey adds: "In some areas of the state, senior citizens have lived in Texas most of their lives but never learned English well enough to take the required citizenship tests. Reading improvement has helped increase self-confidence to the point that some long-time legal aliens have sought to become United States citizens."

LaFARGE LIFELONG LEARNING INSTITUTE

1501 South Layton Boulevard, Milwaukee, Wisconsin 53215, (414) 383-2550

John LaFarge was a Jesuit Priest who believed that "all men and women, no matter what their background, physical limitations, or age should have the opportunity to improve." [31] So when the School Sisters of St. Francis started a small program in 1967 where retired mem-

[31] "History of LaFarge Learning Institute," LaFarge Lifelong Learning Institute.

49-902 0 - 91 - 3

bers of their order could continue to learn and to grow, they chose the name LaFarge Lifelong Learning Program. Incorporated in 1969 as a nonprofit, nondenominational learning institution, the LaFarge Lifelong Learning Institute offers men and women, age 50 and over and physically disadvantaged adults of any age, two 12-week terms of classes, with over 125 courses each term. During the 1990 spring and fall terms, over 2,500 people attended courses taught by 145 qualified instructors, all volunteers.

John LaFarge truly believed that old age was a precious gift, not a disaster. This philosophy translates into an intangible quality called the LaFarge spirit. "Some of the least desirable aspects of aging are eliminated, put to a halt, shelved in the LaFarge atmosphere—the feeling of diminishing personal worth, the growing lack of confidence, the experience of loneliness, and less opportunity for socializing and sharing.[32]

In the LaFarge atmosphere, older students are seen as "chronologically gifted." Maturity has given them a richness of experiences that translates into wisdom. In the LaFarge atmosphere, wisdom combined with education is treasured and encouraged.

Each spring and fall, over 2,500 "chronologically gifted" men and women take up the study of French, Polish, World Religions, Current Affairs, Chinese Cooking and 120 other subjects. They learn, they grow, they improve. In 1987, the LaFarge Lifelong Learning Institute became the recipient of the first *American Association of Retired Persons Institute of Lifetime Learning Award.*

SENIOR CENTERS

The National Institute of Senior Centers reports that over 8 million older adults participate in approximately 9,000 senior centers throughout the United States. Learning activities can be a vital component of these centers, and the type of learning available will reflect the personality of both leaders and participants. "The Talk Show" at the Siouxland Senior Center represents a creative educational program that serves under 75 people even though the Center serves about 60,000

[32] *Ibid.*

people; the description of programs at the Iowa City/Johnson County Senior Center demonstrates a variety of programs offered to the 75,000 people the Center serves. Whether large or small, a senior center becomes "a visible symbol of the community's concern about its older residents." [33]

The Talk Show

Siouxland Senior Center, 217 Pierce Street, P.O. Box 806, Sioux City, Iowa 51102, (712) 255-1729

The Talk Show is a weekly gathering of Seniors at the Siouxland Senior Center in Sioux City, Iowa. The program is a free-wheeling program that provides plenty of opportunities for Seniors to meet newsmakers, discuss current events, or possibly talk to a doctor or lawyer.

The Talk Show has been a cornerstone program of the Siouxland Senior Center ever since its inception in the early 1970's. The founder of the program was the first Director of the Senior Center, Beulah Webb. Ms. Webb reports the program started because she became tired of people gossiping about each other at the Center. Consequently, she asked them to come with current events the next week—they did and that was the beginning.

The program has evolved over the years to its current format. Each week from 10:30 a.m. to 12 noon, an average of 65 Seniors meet to hear about a selected topic and to discuss it. The purpose of the program continues to be to inform seniors about issues or subjects of interest and to offer them the opportunity to discuss their opinions.

Iowa City/Johnson County Senior Center

28 South Linn Street, Iowa City, Iowa 52240, (319) 356-5220

The Iowa City/Johnson County Senior Center served about 75,000 people during 1991. The Center offers a tremendous number of educational courses in the applied arts (watercolors, oils, and ceramics), in the performing arts (chorus and reader's theater), in art appreciation (guest musicians, monthly art exhibits and dis-

[33] *What is a Multipurpose Senior Center?* The National Institute of Senior Centers, National Council on the Aging, Inc.

cussions, dance performances and theater previews), in the crafts (weaving, woodworking, lapidary and needlework), and in areas as diverse as water exercise and computer labs. Special workshops are also offered in such varied subjects as medication, living wills, chair caning, the short story, and low cholesterol cooking.

To receive further information on Senior Centers or publications on how to establish a Senior Center in your community, please write to:

The National Institute of Senior Centers, The National Council on the Aging, Inc., 409 Third Street, S.W., Suite 200, Washington, D.C. 20024

Chapter 4

EDUCATION IN THE WORKPLACE

Around here, we don't consider 50 old. How could we when we have folks here in their 70's and 80's?—F. Peter Libassi, Senior Vice President, The Travelers.

INTRODUCTION

Two trends, chugging along like locomotives, are on a collision course, and the U.S. business community is caught in the middle: the American work force is shrinking and the population that it will need to draw from is growing older. How America will handle this future collision and still remain competitive in the world market will be through adaptability of both workers and employers and through lifelong learning.

Business executives like Frank P. Doyle, Senior Vice President, General Electric Company, promote adaptability and lifelong learning; business organizations like the Committee for Economic Development research these theories; and, everyday folks in ABLE programs from Arkansas to Boston just put the ideas into practice.

To understand the problem, you have to understand the significance of the "baby boomers," those 77-million-plus people born during an 18-year period after World War II (1946–64). The baby boomers caused an increase in our population that has been described by demographers as looking like "a pig in a python" [34] on population charts. As baby boomers begin to retire, the work force that follows them will be much smaller. That means there will be fewer people in our work force to produce goods and services for the country, to provide funds for government programs, and to take care of the young and the old.

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[34] Huey B. Long, "Educational Gerontology: Trends and Developments in 2000–2010," *Educational Gerontology*, 16, 1990, p. 318.

THE CHALLENGE, ACCORDING TO DOYLE

Frank Doyle, in a speech to the Children's Bill of Rights Conference held by the New Hampshire Alliance for Children and Youth, puts the problem in real figures: "Current trends predict an increasing shortage of available workers; it has even been predicted that by the year 2010, the job supply shortage may reach as high as 23 million jobs found wanting for lack of available and qualified candidates." [35]

Problems, to men like Frank Doyle, require solutions, and he promotes the adaptability of both employee and employer and the use of education "virtually from cradle if not quite to grave:" [36]

> America's historic economic power, I believe, has been based on our people power. We have a flexible, adaptable, even agile economy; we are a society of motivated, mobile and talented people. American workers *like* to change occupations, employers and jobs; they do so more easily and more effectively and more frequently than any other workers in the world; they do so in part because they have the basic skills that make them adaptable. The adaptability of our people may be the nation's most formidable economic strength. * * * Adaptability assumes a certain threshold of skills, underpinned by the fundamental ability to learn. When schools fail to foster the ability to learn, they defeat the possibility of lifelong learning.[37]

The lifeblood of adaptability is lifelong learning. Young children need to be made ready for school, schools then need to cultivate and nourish the ability to learn, and public policies and corporate programs need to equip people for jobs instead of supplying jobs for people.

Doyle believes that successful businesses of the 1990's will be those that adapt to developing the potential of people in the workplace and those that place high value

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[35] Frank P. Doyle, "Compassion and Competitiveness: Investing in America's Children," New Hampshire Alliance for Children and Youth, Children's Bill of Rights Conference, Nashua, New Hampshire, Nov. 28, 1990, p. 3.

[36] *Ibid.*, p. 2.

[37] *Ibid.*, p. 6.

on workers' skills and flexibility. Companies will need to create attractive work practices and training programs, possibly bringing back early retirees to work in training centers. Retirement age will be raised, and flexible retirement programs will be offered in order to retain skilled workers:

> Those firms that invest in human resources with the greatest speed and creativity will gain. The successful companies of the '90s will invest as aggressively in human resources to achieve higher productivity, as the successful companies of the '80s invested in cost-cutting and product and process technology.[38]

According to Doyle, business will pick up more and more of the expense of lifelong learning, and a deficit-constrained government will pick up less. The corporate world will realize that it is the direct beneficiary of training investment, and it will see education and training, not as philanthropy or corporate responsibility, but as productivity and profitability through the competitive edge of a trained, flexible labor force. Doyle says the $20 billion a year for in-house education and training that corporate America pays now is "only a drizzle before the deluge." [39]

> The most successful companies of all will be those that elevate their level of creativity, and commitment to human resource issues before it is necessary, just as companies that anticipated the need to restructure and globalize thrived during the '80s. Companies that do not change before they must will be defeated by their competitors who do. * * * The winners will be those companies and those governments who welcome people-power, and do not resist it as a challenge to their own." [40]

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[38] Frank P. Doyle, "People-Power: The Global Human Resource Challenge for the '90s," *The Columbia Journal of World Business*, Volume XXV, Numbers 1 & 2, Spring/Summer 1990, p. 38.
[39] *Ibid.*, p. 43.
[40] *Ibid.*, p. 45.

THE COMMITTEE FOR ECONOMIC DEVELOPMENT

Business organizations delve even deeper into the problem of keeping the American business community internationally competitive in the face of these problems. The Committee for Economic Development (CED) is a private, nonprofit, and nonpartisan research and education organization composed of 250 top business executives and presidents of major universities. Their goal is to study and find solutions to social and economic issues that affect America's future economic health.

Hot off the press from the CED is a new study called *An America That Works: The Life-Cycle Approach to a Competitive Work Force.* The CED study concisely states the problem, the challenge, and the solution:

The Problem/Challenge

"America has entered an era of fewer entrants into the work force and an aging population. * * * The challenge for business and public policy makers will be to develop qualified workers to fill the increasing numbers of knowledge and technology-driven jobs. Without an educated, able citizenry, America will suffer lower living standards, with far too many of its people shut out from the opportunities our economy and society will have to offer." [41]

The Solution

"The ability to make the best use of human resources is now a strong competitive edge for both countries and companies. In the new world of fewer workers and higher-value jobs, the advantage will go to those nations and businesses that invest in their people, recognize and remedy underutilized potential, and produce an educated and an adaptable population." [42]

Concerning Lifelong Learning

"Achieving this competitive advantage will require new approaches to education and the management of human resources that emphasize learning, flexibility,

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[41] *An America That Works: The Life-Cycle Approach to a Competitive Work Force,* Executive Summary, pp. 1.
[42] *Ibid.,* pp. 1-2.

and productive participation in work and society throughout the entire life of an individual." [43]

In the past, we have approached problems by artificially grouping them into categories, such as by age group or subject matter. The CED proposes a more natural means of solving our problems, a plan called the life-cycle approach that "links each stage of life and work to the next. * * * Youths will one day be adults, and adults will grow old." [44] They suggest that public and private policies "help children reach school healthy and ready to learn, prepare young people for rewarding work and community participation, enable adults to be self-sufficient, and help older citizens remain active and independent." [45]

Concept is translated into concrete as the CED study offers specific suggestions for the government, for businesses, and for individuals. Of the many detailed suggestions offered, only a few can be listed here. For younger children, the CED recommends full funding of Head Start for every eligible child. It recommends that businesses enter into reciprocal agreements with schools in which concrete job commitments are linked to improved educational outcomes. For adults, it recommends that firms budget for education and training just as they do for investments in physical capital and that changes in U.S. tax policies be made to stimulate new investment in employee education and development. For older adults, the CED says that both private business practices and public policies discourage work by older people. Early retirement may have made sense in times past when there were fewer jobs and more job applicants, but it will not make sense in tomorrow's world where there will not be enough skilled people for necessary jobs. They suggest changes in the Social Security regulations that discourage work by people 65 to 69 years old because of reduced benefits. In addition to encouraging work among the "young old," the CED suggests a reexamination of how we deal with the needs of the "old old."

Briefly put, the CED points out in great detail how changes need to be made to improve each generation's

[43] *Ibid.*, p. 2.
[44] *Ibid.*, p. 6.
[45] *Ibid.*, p. 2.

ability to help both itself and the generations that come before or after. Problems will not be eliminated, but the burden will be greatly reduced for all, and America will move ahead in a smooth, natural flow.

THE BUSINESS OF BUSINESSES

Now, down to the business of businesses. What are individual companies doing to tap into underutilized older workers who were previously unneeded? Perhaps the most indepth look at creative programs and opportunities for older workers can be found in a publication from the AARP called *Using the Experience of a Lifetime.*[46] The booklet draws its information from NOWIS, the National Older Workers Information System, a computerized system of data from over 200 older worker employment programs currently in place in the private sector. NOWIS was developed by the University of Michigan's Institute of Gerontology and is maintained by AARP.

What follows is a sample of educational programs highlighted in *Using the Experience of a Lifetime.* The information given below is used with permission:

> *Grumman Corporation* offers Mid-Career Training Programs and courses in management and professional development that appeal to middle-aged and older workers who might want to try new careers. In addition, Grumman offers courses specifically targeted to women that enable them to update their skills, retrain, develop new skills, and define career goals upon returning to the work force after raising a family.
>
> *General Electric*'s Aerospace Electronic System Department established a special "Technical Renewal Program" for engineers who needed new skills to stay current with changing technology. GE encourages continued education for all employees.
>
> *Crouse-Hinds ECM* aggressively offers training opportunities to all its workers. Long-time employees can upgrade their skills or use cross-training to enhance job security. Most partici-

[46] *Using the Experience of a Lifetime,* AARP, 1990.

pants in these particular types of programs are between 45 and 65 years of age. Retiring employees can participate in the Tuition Assistance Program which prepares them for part-time or second careers.

AT&T Bell Laboratories consistently emphasizes training. AT&T Bell Laboratories in New Jersey offers Continuing Education Programs that encourage personal growth as well as professional excellence of technical and administrative employees. The courses are taught both in-house by AT&T staff members as well as local university faculty. The grading system is simply pass/withdrawal, and withdrawals are not recorded in employee files. About 19,000 employees enroll each year in about 500 CEP courses that are offered. Programs other than CEP may vary from short workshops to semester-long courses to utilization of individualized learning centers where video and audio tapes and other study materials are available. Since 1986, the company has required every employee to take 20 hours of education annually.

Pitney Bowes, Inc., offers a retirement educational assistance program in which employees and their spouses over 50 are eligible for tuition reimbursement up to $300 a year per person, continuing for two years after retirement, for a maximum of $3,000 per person. Courses in real estate, secretarial and business skills, financial planning and academic subjects can lead to second careers or provide additional income following retirement. A second program available to employees offers full reimbursement to employees for academic courses leading to a degree or for job-related studies.

McDonald's Corporation has its own special educational program called McMasters that provides skills training and job placement for persons 55 and older. The program is a partnership between McDonald's and a government agency, such as a State Department of Aging. Approximately 80 to 100 employees are trained each year per McMasters program.

Aerospace Corporation operates both management and technical training programs, as well as offering a variety of full-time tuition reimbursement plans. In addition, Aerospace allows employees to design their own special studies that may last from 3 to 6 months. The employee is paid during that time as well as receiving reimbursement for educational expenses. The example given in AARP's publication is of a 55-year-old engineer who used this opportunity to design a program to study the feasibility of wind-generated power sources.

LEARNING COALITIONS

Perhaps the most encouraging lifelong learning programs today are those that result from unusual coalitions of government, businesses, and individuals. Two creative career-oriented programs that succeed because of new combinations of support—the Union City Older Workers Day Care Training Program and Operation ABLE of Greater Boston—have been highlighted below:

UNION CITY OLDER WORKERS DAY CARE TRAINING PROGRAM

138-39th Street Union City, New Jersey 07087, (201) 348-2754 or
219-47th Street, Union City, New Jersey 07087, (201) 348-2750

Although the location is New Jersey, this pilot program to train seniors to take care of children in day care centers is definitely a match made in heaven. Dana Berry, the director of the Union City day-care centers, sums it up quite well: "The outstanding thing about seniors is that they have patience. Everything with them doesn't have to be done yesterday. And this calm-centeredness has a very positive effect upon children. Seniors in this program also have a sense of humor and a commitment. If they didn't enjoy children and want to be with them, they wouldn't be here." [47]

When this type of caring is combined with a good, solid training program, the result is excellence. The Union City program is the only one of its kind that is accredited by the National Association for the Education of Young Children, an accrediting organization of

[47] "They Call Her 'Grandma,'" *DCAdvisor*, Spring 1989, Vol. 2, No. 3.

child-care programs. It is unique because it operates in two sites and 11 satellite day-care programs in care givers' homes and offers a multi-cultural and bilingual experience.

The 160-hour comprehensive training program lasts 8 weeks and offers classroom training in child discipline, nutrition, and arts and crafts. Trainees also work alongside child-care professionals in the Union City day-care centers. Graduates go on to work as aides in day-care centers or latchkey programs, as nannies, or as child-care providers in their own homes. So far, 224 people have participated in the program, 221 of that number have graduated, and *all* graduates have been placed in child-care jobs. Ms. Berry says there is a secondary benefit as well—trainees report that they are better grandparents because of their learning experiences and that they pass on better parenting skills to their own grown children.

The program, the brainchild of Sandra Krivit of Krivit Associates, shows how much can be accomplished when the public and private sectors work together. The Hudson County Office of Employment and Training pays for the 8-week training program. The Union City Day Care Program provides early childhood specialists to teach. The Division on Aging, using funds through the Job Training Partnership Act and Title V of the Older Americans Act, subsidizes the participants both while they are in the program and up to 6 months afterwards while they look for work. Hudson County Green Thumb and the Urban League help fund the $3.35 an hour that the trainees receive.

The seniors who go through the program will benefit because they will acquire paraprofessional training, supplemental income, a valuable purpose in life, and a way to help others in their community. Parents in low- to middle-income families will benefit because they can now find low cost, high quality day care in their area. Children will benefit because they will be cared for by trained, day-care professionals, who bring with them the positive qualities of maturity—patience, experience, appreciation of employment, and "hug-ability."

Operation ABLE of Greater Boston

World Trade Center, Suite 306, Boston, Massachusetts 02210-2078,
(617) 439-5580

Operation ABLE (Ability Based on Long Experience) is a private, nonprofit organization dedicated to promoting employment opportunities for individuals aged 45 and older. The first ABLE, founded in Chicago in 1976, was the brainchild of Shirley R. Brussell, who is still Executive Director of the original Chicago ABLE. Today, there are 11 full-fledged ABLE-like programs in other cities and 6 baby ABLEs still in formation.

Since the founding of the Boston chapter in 1982, the Boston ABLE has helped more than 15,000 middle-aged and older workers find full-time, part-time, and temporary employment.

Currently, the Boston ABLE is in the process of opening up a computer skills training center, The Career Transition and Technology Training Center for Older Workers. Robin Battista, Executive Director, feels that this new computer training center is a first step in solving the computer skills gap among America's work force. "If older workers are to compete successfully in the labor market and thrive in the workplace, they must be comfortable with technology and develop appropriate skills." Ms. Battista believes there are three factors that distinguish ABLE's computer skills training project from others:

1. The target population is workers aged 45 and older. The rapid change in technology and shifting international markets has made workers age 45 and older in Massachusetts vulnerable to job loss. Since 1985, scores of Massachusetts companies across several occupational sectors have reduced their work force through massive personnel cuts, attrition, and early retirement programs. Middle-aged workers and older workers have often been most affected by these cuts.

These workers face extreme hardship in securing work in their later years. Older workers are handicapped in the job search process because many of them have never looked for a job during their working years. They are also handicapped because of covert and overt age

discrimination in the job search. And the lack of computer literacy hampers their opportunities even for entry-level positions. This project will remedy the lack of basic computer "know-how" and "technophobia" among older workers.

2. A cooperative effort between business and ABLE is central to the Center. IBM is contributing the hardware, software, and related equipment. Digital Equipment Corporation has developed the training curriculum. Both companies have assigned staff to assist with the planning and implementation of the Center. A Business Advisory Council, consisting of representatives from companies who will hire graduates, is being established. ABLE has demonstrated that strong partnerships with the business community are essential for positive placement outcomes to occur.

3. Funding for the Center has been committed by a diverse donor base—private foundations, corporations, and the local City government. To date, $200,000 has been raised; and IBM and Digital Equipment Corporation are contributing approximately $200,000 in in-kind services to the Center.

Chapter 5

AMERICA'S FUTURE THROUGH LIFELONG LEARNING

> In the decades to come, there will be fewer children and greatly increased numbers of elderly. Every aspect of American life will be affected. * * * Will we have a better society or a worse one? It depends on us.[48]

AT THE CROSSROADS

We are at an opportune moment in our American history, a crossroads of sorts. We need to stop for a moment, look in all directions, then proceed ahead.

The baby boomers, the 77 million Americans born after World War II, are aging, and, as elders, they will be numerous, powerful, and highly motivated to have a good quality of life as they grow old. They have influenced our society and caused changes at every stage since their birth, and there is no reason to expect that pattern to change. They age in a world where scientific and medical advances will enable them to live longer, not as frail elders but as a generation which has been given what Dr. Lydia Brontë calls a "second middle age." They will function in a world where the work force values the skills they have acquired over a lifetime and where new technology allows them to contribute for a longer period of time than their forefathers who toiled away at manual labor. They will set the pace and lead in their old age as they have done in youth and middle age. This leadership from elders comes at a time when America desperately needs not only skilled workers on the job, but also role models, mentors, and intelligent caregivers for its children, qualified volunteers for its schools, tutors for its immigrants and refugees, and help with its environment. Volunteer groups

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[48] *Our Aging Society: Paradox and Promise,* eds. Alan Pifer and Lydia Brontë, jacket.

of wise elders are assuming the mantle of leadership for a society that has worshiped youth too long.

Implementation of lifelong learning will be one of the great achievements of the baby boomers. This need for educating older adults—for pleasure, for work, and for survival—will cause a dramatic shift in private and public policies. The focus on dealing with problems will have to be on prevention through education rather than on treatment after the fact. Lifelong learning can't make us "healthy, wealthy, and wise," but it could come close.

HEALTHY

One of the great fears of today's society is that baby boomers will cause a tremendous financial burden to the country as they need more and more medical care in old age. A report issued by the Institute of Medicine entitled "Extending Life, Enhancing Life" says the United States spends more than $162 billion annually to treat health problems of the elderly and that the cost of caring for disabled older people "will double in the next decade unless ways are found to prevent or delay disabling illnesses." [49] The report encourages that money be spent on scientific research both to improve the quality of life for America's aging and to make an economic difference. Julius Krevans, chairman of the committee that produced the report, says that "if research found a way to delay by only one month an elderly person's entrance into a nursing home, the nation could save $3 billion a year." [50]

Jacques O. Lebel, President of the New Jersey Council on Senior Citizen Education, also advocates a shift in spending priorities, recommending that funds be reprogrammed away from treatment and custodial services for the elderly and over to educational intervention (prevention). "Current data * * * clearly shows * * * that an extended independent existence followed by a brief period of rapid decline prior to death can become the pattern of normal aging in our society. But prerequisite to that pattern are a number of behavioral and attitudinal changes (improved health care, better nutri-

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[49] The Associated Press, "Studies Could Lower Costs of Aging," *The Times-Picayune*, New Orleans, LA, June 13, 1991, A-23, col. 1.

[50] *Ibid.*

tion and fitness, improved coping skills, etc.) all of which will only come about through a system of greatly increased educational intervention."

This marriage of scientific research and educational intervention to produce healthy aging is already taking place. Dr. Matilda White Riley of the National Institute on Aging has long been an advocate of the scientific benefits of learning experiences for older people. A recent article in *The New York Times* ("The Aging Brain: The Mind is Resilient, It's the Body That Fails") reports on scientific studies that suggest that the aging brain can indeed be capable of functioning and learning at a normal level, and that decreases in function may be due not to aging but rather to disease or lack of use.[51] The August 1991 issue of *Prevention* magazine includes an article on the future of "memory pills." The Alliance for Aging Research has issued a report entitled "Aging Research on the Threshold of Discovery" that alerts the nonscientific public to potential scientific breakthroughs that could dramatically affect our aging society.

Demographic statistics support the need for healthy elders. Scientific research and educational intervention add quality to the aging process. But, theory and research become reality only when programs that teach healthy aging begin to spring up for every social and economic group.

Imagine a program that teaches adults a healthier, new way of life. It exists:

More than 30,000 people have participated in the medically supervised programs at the *Pritikin Longevity Centers.* The average age of the participant is 53, and the Center at Santa Monica graduates about 2,600 people a year. The Pritikin program focuses on diet, exercise, and stress reduction. Its basic goals are to have the participant show great improvement while at the Center and to learn how to maintain a healthy lifestyle when he or she gets back home. Pritikin uses education as the motivating force to change unhealthy habits into a new, healthier way of living. Classes and workshops abound on weight control, stress management, heart disease, hypertension, cancer protection, lifestyle

[51] Gina Kolata, "The Aging Brain: The Mind is Resilient, It's the Body That Fails, "*The New York Times,* Apr. 16, 1991, Sec. C, p. 1, col. 1.

changes, and nutrition. The Pritikin philosophy also includes aggressive research, and more than 20 studies of what has been accomplished through a Pritikin "education" have been published.

Imagine a 10-day, pre-retirement program that offers retirees a chance to have a healthier old age. It exists:

Canyon Ranch, a health spa in Arizona, created "Eldercamp," a 10-day program that offered an all-expenses-paid vacation to 33 Tucson seniors who were healthy but sedentary men and women between the ages of 60 and 70. They served as volunteers for a multidisciplinary study on healthy aging. One of the goals of the study was to see if "a 10-day 'camp' for newly retired people works to make significant improvement in their health, that can be reproduced elsewhere." [52] Mel Zuckerman, CEO, Canyon Ranch, reports on the documentable changes in the group over a 6-month follow-up period: "Overall we have seen continued weight loss, drops in cholesterol, increases in flexibility, increased cardiovascular fitness, increases in psychological status, decreased smoking and increased exercise levels. Also, we have documented changes for the better in immune function and we are just beginning to analyze our data on EEG brain changes. We are hoping to see 'younger looking' brains at the three month point than at the beginning of the program."

Imagine a program that reaches out to minority elders and teaches them how to avoid prevalent diseases. It exists:

The *AARP* offers a free-loan program that includes a videotape and booklet entitled "Healthy Aging—Making Health Promotion Work for Minority Elders." The videotape profiles five successful programs for minority elders:

—"Paso a Paso" (Texas) for Hispanic elders;
—"Self-Help for the Elderly" (California) for Pacific/Asian elders;
—"Growing Older with Health and Wisdom" (New Mexico) for American Indian elders;
—"Washington Seniors Wellness Center" (Washington, DC) for Black elders; and

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[52] Dr. Phil Eichling, as quoted in Carolyn Niethammer, "Seniors Rediscover Joys of Life," *Canyon Ranch Round-Up,* Summer 1990, p. 6.

—"STAY WELL" (New York) for multicultural elders.

The booklet lists *common health risks* for specific older minorities and the *modifiable risk factors.* It then suggests *program ideas for preventive care.* Key strategies for organizing health promotion programs are provided, and guidelines for developing programs for minority elders are listed. A list of national organizations that can help is given as well as the addresses for the model programs shown in the video and ideas for other programs and activities.

Imagine a program that teaches those with disease how to function at a higher level. It exists:

At the *Southern Baptist Hospital* in New Orleans, Louisiana, the Arthritis Center offers a variety of programs led by healthcare professionals who are trained and certified by the Arthritis Foundation to help people control arthritis. PACE (People with Arthritis Can Exercise) teaches proper exercise to increase joint flexibility, range of motion, muscle strength and cardiovascular conditioning. An arthritis self-help course teaches self-management principles that will help persons with arthritis increase their capabilities and develop more confidence. The Arthritis Aquatic Program is a class for swimmers and non- swimmers. The Arthritis Community Forum teaches through 2-hour seminars facts about arthritis and other rheumatic diseases including the latest medical/surgical treatment and the psychological aspects of dealing with a chronic disease. There is also a speaker's bureau for clubs, organizations, or senior citizens groups who are interested in learning more about arthritis.

The programs mentioned above are but a few of the many that exist, and they are only the beginning. Imagine an America that promotes healthy aging, an America that is enthusiastic about living all stages of life to the fullest. It is indeed a more worthy goal than the future America we now envision, one that will carry the financial burden of supporting 77 million elderly baby boomers.

WEALTHY

Some possible implications of lifelong learning on financial matters have already been discussed: money

spent on research and educational intervention can mean less money spent on health care treatment and custodial care; and money spent on training workers throughout a lifetime can mean a more productive American work force. But, there's even more to be gained from lifelong learning from a financial point of view if you consider the impact on an individual's quality of life and even on that person's ability to survive.

Consider the testimony of a 90-year-old man who appeared before a California legislative hearing on lifelong learning:

> Do you expect anyone to be able to function with what he learned over 75 years ago when there was no computer, telephones had just appeared, there were few cars, faxs were unheard of, banking was done in person, and we lived a much less complicated life? Lifelong learning is a necessity just to keep up, to say nothing of getting ahead!" [53]

The changes that will take place in the next 75 years will be just as dramatic, making lifelong learning still a necessity. Add other conditions, such as the possibility of an elder becoming ill, being a refugee, living alone and apart from his or her family, or lacking an ability to generate income other than possible Social Security, and you'll see a particular need for financial planning for our later years. Retirement at 65 and living until 95 demands preplanning, and preplanning demands that we learn how to do it the right way and in enough time. Lifelong learning can do this.

Dr. James E. Birren, Director of the Anna & Harry Borun Center for Gerontological Research at the University of California, Los Angeles, adds another layer to the importance of lifelong learning for our financial well-being:

> Older persons face many daily decisions that affect their ability to remain healthy, independent and productive. One of the most important risk factors for erosion of health and independence in the later years is low education and its

[53] As quoted by Brenda B. Ross, Chair of the Education Committee of the Senior Citizen's Advisory Committee, Orange County, California, Area Agency on Aging.

> correlate of poor consumer decision strategies. This is particularly true in a changing society with new information, products, services, and new marketing strategies. Consumer education for older persons is needed to help them conserve their resources and maximize the quality of their lives * * *. Increasing the consumer effectiveness of older adults will relieve their need to rely excessively on someone else for supplies, money, or other supports. This is particularly important in times when the public budgets may not be able to respond with sufficient resources.

Career training, retirement planning, and consumer know-how should be part of enlightened eldering. Our financial well-being needs to be woven into the framework of lifelong learning programs. At Mainstream, the Retirement Institute of Westchester Community College, Valhalla, NY, over 6,000 older adults a year study for self enhancement, for improved health, for job placement, and for survival. Dr. Reva Greenberg, Mainstream's director, says the students range from vital, educated and financially secure to frail, low-functioning and economically vulnerable, and the courses offered reflect their needs. The curriculum includes enrichment, skills building, computer technology, educational travel, pre- and post-retirement, and work force education and training. Consideration and constructive thought are given to the special needs of the Hispanic elderly, the developmentally disabled, the bonding of the generations, and health and wellness. The Center for a Mature Work Force offers training for paid and volunteer work. *Project Transition* is a center for displaced homemakers. Seniors learn telecommunications at the Mainstream SeniorNet Computer Learning Center, and *OUR TIME: Living the Later Years* is a weekly cable T.V. series cosponsored with the Westchester County Office for the Aging that allows the older person to learn at home. Dr. Greenberg says the list of programming possibilities is as endless as the well of human potential.

AND WISE

Wisdom for the 21st century does not come out of the mouths of babes. What follows are observations from

enlightened elders, from those concerned with issues for elders, and from some who simply see the tomorrows today.

> A concern for the future is the need for inclusion of older participants from all socioeconomic levels in the educational programs. * * * it should be relatively easy to design programs and recruit older persons of higher socioeconomic status. These programs must be balanced with those for people with less education, limited literacy, little knowledge of English, and fewer coping skills. Financial support from the federal government and foundations should give first priority to these individuals and to programs that meet their needs * * *.—David A. Peterson and Pamela F. Wendt, University of Southern California.

> My program brings me in contact with the problems of the aging adults. They live good productive lives and then sickness and tragedy happens and their life changes. I try to bring out the good things in life and try to revive their self confidence again. I introduce them to an agency where they can be useful and at the same time learn some of the new things in business. Eventually as they learn new things, their interest sharpens in what is going on in the world. Soon they become real people again * * *. I found retirement the most boring part of my life. I turned it around and have been turning others around ever since. I enjoy knowing that at 82 I can still be a caring human being.—Aseneth Sweet, Division on Aging, New Jersey.

> The vision we have of the future of the adult education system is one that allows adults, regardless of educational level or ability, to enter the appropriate program easily through quick assessment and referral in a local skill clinic, and to get the education and training they need. The education and training will be competency-based so adults progress as they master

the material. Programs will be learner- and family-centered allowing the individuals who participate to receive the education and skills to become self-sufficient and to make a better life, not just for themselves, but for their families and children. The programs, offered through a coordinated delivery system involving federal, state, and local education and training programs and social services as needed, will have standards and measures of accountability assuring high quality. And finally, these education and training programs, in part through the use of technology and distance learning, will be available in every rural, suburban and urban community.—Betsy Brand, Assistant Secretary for Vocational and Adult Education, U.S. Department of Education.

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* * * a goal of the 19-year-old Adult Health and Development Program, the seven-year-old Camp Rediscovery, and the National Network Plan for Intergenerational Health is to tighten the social fabric of the country by bringing people together to work toward common purposes. Barbara Tuchman refers to this era as the Age of Violence. The increase in man-made causes of violent deaths reinforces her point. When we bring approximately 200 people together each semester regardless of their status in health and well-being, race and ethnic background, age, etc., stereotypes and labels are abandoned as people are seen as individuals.—Dan Leviton, Ph.D., Professor, Health Education, University of Maryland.

(The) holistic view of the family influence upon education from the youngest child through grandparenthood is especially gratifying to me. Demographics show that the aging will live long enough to influence several generations.—Lindy Boggs, Former Congresswoman (D–LA).

It is still true that an adult going back to school is the surest way to set a good example

for educating children.—Lamar Alexander, Secretary of Education.

My mother, I think, was 93 when she got some notoriety * * *. She signed up for a course at St. Andrews College. She wanted to take a history course. She wanted to take ancient history. They said, "We've got such an interesting professor here in the course on modern history." She said, "No, thank you, I lived through all that."—Senator Terry Sanford (D–NC).

CONCLUSION

Older Americans want to learn, are able to learn, and benefit themselves and others through learning. This is a valuable piece of the American puzzle as we plan our future as Americans who are living longer in a society that is aging.

At the Cherokee Nation of Oklahoma, elders learn to read so they can help their grandchildren with homework. At UMASS/Boston, elders return to college to get degrees in gerontology so they go out into the world to help other elders. At Pitney Bowes, elders acquire new job skills so they can keep up with changing technology or prepare for new careers.

At churches, synagogues, community centers, corporations, college campuses, hospitals, and homes around the country, older people are learning, learning, learning. They bring experience to education, and the result is a unique combination that enables them to help themselves and to help others.

Lifelong learning is not a quick fix, but rather a slow and steady-moving train. Academicians, business people, educators, politicians, and scientists are beginning to jump aboard. There's room for everybody, but the passengers who have the first-class tickets are the elders. Today's elders are the pioneers; the baby boomers, as they become elders, will weave lifelong learning into America's fabric; and a new group, the "echo baby boomers," is just being born and will grow up to become elders who take lifelong learning for granted. All elders who learn in order to maintain their health and their mental flexibility, and especially those who use their

learning to give something back to society, are full participants in America's future. They've simply taken that slow-moving but steady train from "I think I can, I think I can, I think I can" [54] to "I thought I could, and I did!"

[54] Watty Piper, *The Little Engine That Could.*

APPENDIX A

Education as a Lifelong Process

(By Harry R. Moody)*

"Our Aging Society: Paradox and Promise," Edited by Alan Pifer and Lydia Bronté, W. W. Norton & Co., New York-London, 1986

[Reprinted with permission from the Carnegie Corporation of New York]

America's emergence as an aging society has profound implications for the role education plays over the course of life. As Philippe Aries has shown, education has a strategic role in society, for its structure serves to shape our image of the life cycle as a whole.[1] A century ago, a "modernized" life-cycle emerged which expressed a view of the life course that linked education to the mass industrial economy and drew rigid boundaries between the stages of life.[2] In this modernized life-cycle, education, work, and leisure were assigned sequentially to the life stages of youth, adulthood, and old age.

Today the advent of an aging society has begun to challenge this pattern. Education is no longer tied exclusively to youth, and we have begun to see declining numbers of young people among those age groups that traditionally have been served by colleges. Higher education has already responded to this demographic change with modest steps toward non-traditional learning, but there have been far fewer changes in educational philosophy, financing, or curriculum. Business and industry have promoted their own view of education in

* The author is grateful for support from the Andrew Norman Institute for Advanced Study at the Andrus Gerontology Center, University of Southern California, as well as the Mina Shaughnessy Fellowship Program of the Fund for the Improvement of Post-Secondary Education during the period this article was written.

[1] Philippe Aries, *Centuries of Childhood* (New York: Alfred A. Knopf, 1962).

[2] Gerald Gruman, "The Modernization of the Life Cycle," in D. Van Tassell, K. Woodward, and S. Spicker, eds., *Aging and the Elderly: Humanistic Perspectives in Gerontology* (Atlantic Highlands, NJ: Humanities Press, 1978).

terms of "human-capital formation," but programs to retrain workers for the post-industrial economy have rarely included older workers.

These modest and halting steps are a weak response indeed to what must be seen as *the* decisive demographic revolution of the twentieth century: the aging of societies throughout the industrialized world. Loosening the boundaries between life stages and making them more flexible seems desirable, but fails to address the real question: how can the dramatic rise in life expectancy become the basis for new social productivity—for a genuine abundance of life? What role can learning play in preparing individuals *at every stage of life* for a society where most people can expect to live to old age? These challenges will demand a change in the relation between education and life stages.

THE EDUCATION OF CHILDREN IN AN AGING SOCIETY

Support for Public Education

For over a century, public policy has supported universal mass education for children and young people. That public support is now threatening to decline, in part because of our society's shrinking proportion of children and its growing proportion of elderly. Today, only 20 percent of American voters have school-age children, and opinion surveys show that older people are far less likely than other groups to support school-tax increases.[3] In the past, public support in this country for the education of children and young people depended on a variety of sources, and was an expression of the democratic ideal of common citizenship that united all generations. Public support for education was based on a willingness on the part of parents to make sacrifices in order that one's children may have a better life, and obligations to the next generation were tied to an ideology of social progress and upward mobility.

In recent times, this older ideal of citizenship has faded, leaving the desire for economic growth the chief rationale for public support of education. Today, even this economic rationale has been weakening, since education no longer guarantees a good job. While schools

[3] See Samuel H. Preston, "Children and the Elderly in the U.S.," *Scientific American*, Dec. 1984, pp. 44–49.

and colleges once had a monopoly on education, because they granted credentials that had value in the job market, the comparative advantage of credentials has fallen today, while competition for good jobs has heightened. Growing numbers of people are described as "overeducated" or "underemployed." Under these conditions, it becomes more difficult to justify educational expenditures on the old grounds. As a result, claims for support of public education are based increasingly on labor-market forecasts and on economic planning—on the need for a skilled labor force to attract high-technology industry, for example. But public support also depends on whether voters perceive that schools are doing a good job, and evidence of our public schools' effectiveness has weakened that support.

School Reform

It was the wide public recognition of these trends, along with a new environment of international economic competition, that were largely responsible for the clamor for "school reform" that arose in the early 1980s. But the challenge of school reform, which is open to several quite divergent solutions, has been posed for the public in very narrow terms. The strategy that has received the most public discussion is the one that would thoroughly upgrade public education, particularly on the secondary level. In some areas of the country—Texas for example—leaders from high-technology industries have been prominent advocates for such school reform, but, for reasons suggested earlier, financing public education when fewer families have children in the school is a continuing problem.

If the general strategy for school reform does not bear fruit in producing a skilled, flexible labor force, then business may opt for a second strategy: targeting private "human-capital" investment in job training for highly specific occupational skills. This strategy has an advantage for corporate planners, since the control of education goals would then remain firmly in the hands of business. The business community could also find allies in the higher education sector; already, over half the colleges in the United States operate joint training

ventures with private industry, and the trend is growing.[4]

It is comforting to imagine that this kind of human-capital investment approach might offer "second-chance" opportunities to groups that have so far been unsuccessful within the formal educational system. But if resources are invested according to the needs of the business community, we are more likely to see a further erosion of constituencies for the "open access" forms of education that have been vital for the disadvantaged. In one year, for example, the California community-college system experienced a 25 percent drop in enrollment after it had imposed a tuition charge. The issue ultimately confronts us with a choice between public or private control over decisions affecting human-capital investment—what we call education.

With an aging population, public education at all levels is likely to remain on the defensive. Schools will be further tempted to justify their effectiveness on narrow economic grounds. But government will continue to be faced with other competing demands, such as the rising health-care costs of the elderly. When struggles are waged through conventional interest-group politics, we risk the danger that young and old might be polarized. One alternative would be to convince all age groups that they have a common stake in educating the next generation.

A case that illustrates this point can be found in Brookline, Massachusetts, a community of 55,000 people with a very high proportion of the population—20 percent—over age sixty five.[5] At the same time, 25 percent of the school-age population is composed of minority children, chiefly black and Asian. In Massachusetts, as in California, a major property-tax limitation measure was approved. But in Brookline, despite its high proportion of predominantly white senior citizens, the community voted overwhelmingly *against* the property-tax limitation at the same time the measure was winning elsewhere in the state. One reason for the voting pattern lay in the strong support for schools by Brookline senior

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[4] Nell P. Eurich, *Corporate Classrooms: The Learning Business*, (Princeton, N.J.: Carnegie Foundation for the Advancement of Teaching, 1985).

[5] I am indebted to Dr. Robert Sperber, former Superintendent of Schools of Brookline, Massachusetts, for background information provided at the Carnegie Project Conference on Education and the Aging Society.

citizens, support that was cultivated as a result of years of community effort.

Three elements were key to the Brookline success: public information, school-based services for older people, and the active recruitment of senior citizens as school volunteers. The public schools were used as sites for serving hot lunches to senior citizens and for other services such as health screening and recreation. Adult education programs were moved to community locations, while unused school buses were made available to senior citizens for shopping during the day and for transportation to cultural events in the schools at night. Older people were recruited as volunteers for tutoring, for teaching English as a second language, and for the sharing of life experiences. When the drive came to limit school expenses, the senior-citizen vote in Brookline was substantially against the state-wide trend.

Is it possible to generalize or to replicate the Brookline experience in other communities in America? There are some signs that this is already happening. In many localities, closed school buildings have been turned into community centers. The National Organization of School Volunteers showed striking success in recruiting the elderly as volunteers in cities across the United States. These are promising efforts, for they incorporate the elderly as a new constituency and as contributors to the learning process. But volunteerism also has its limits. The predominantly white elderly of Brookline are unlikely to travel to Roxbury ghetto schools, for example. Schemes for voluntary action must be balanced by changes in public policy.

Our current public policies continue to reinforce the century-old "modernized" life course, with its linear separation of education, work, and leisure. Social Security, which depends on younger workers, is part of a federal taxing system, while school and property taxes are assessed by local government. These taxation policies end up pitting age groups against each other, raising the specter of elderly homeowners repeatedly voting down school-bond issues—as happened over a period of years in the Sun City, Arizona, retirement community.

We are faced not simply with the task of convincing older people to volunteer in the schools, but with reminding people of all ages that each generation has taken on an obligation to preserve a free society for the

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next generation. Younger adults without children, as well as grandparents with no children currently in school, need to understand this obligation in far broader terms than they now perceive it. Like military service, public education has provided a basis of common citizenship, of ties to community that reach beyond any single generation. In the present political climate, the policy dilemma may come down to two quite different versions of conservative ideology, one that emphasizes self-interest in the marketplace model (that is, human-capital formation), and the other based on some version of obligation to a common good that transcends any single generation.

Children and young people will have to be educated in ways that strengthen, rather than erode, these intergenerational ties. Promoting more positive attitudes towards all stage of life, including old age, would be one way to begin. This is a task that must extend from elementary education right on through the most advanced professional schooling—for example, to the education of physicians, who often display either a lack of interest or an openly negative attitude toward the chronic diseases of geriatric practice, despite the fact that in most fields of medicine geriatric patients already constitute more than a third of the patient load, a figure that will surely increase. It is promising that some positive models for gerontological education in the professions are beginning to emerge.

RETRAINING MIDDLE-AGED AND OLDER WORKERS

The Aging Work Force

With population aging, the relations between work, retirement, and retraining are likely to change. In the past few decades, while the average age of retirement has been falling, recent federal legislation has been moving in the opposite direction, raising the Social Security age to sixty-seven and the mandatory retirement age to seventy, for example. By the year 2000, half the work force will consist of people age thirty-five to fifty-five. With fewer young people seeking employment, we may be unable to forgo the productivity of older workers. These trends make it imperative to rethink the role of worker retraining from the perspective of the entire life span.

The prevailing pattern has been for employers to provide job training, either directly at the work site or by means of tuition reimbursement plans. Yet far fewer employees than might be expected have taken advantage of retraining opportunities. Experience suggests that simply offering educational programs or financial assistance is insufficient; individuals must also be convinced that it is both worthwhile and feasible to take advantage of the available opportunities. In the past, many companies believed that it was cheaper to hire and train younger people than to retrain older workers, and a widespread bias has remained in favor of providing training resources to relatively young employees.

A Life-Span Approach to Retraining

Proposals for retraining middle-aged or older workers must take into account the serious problem of social *expectations* about what is appropriate in later life. We have noted that people were generally locked into a "linear life plan"—a sequence that consisted of education, work, and leisure, in that order. An optimal model for the future would integrate life planning over the entire life course. This would create workers who are not only well prepared, but who are highly motivated to participate in training and retraining.

The Role of Colleges and Universities

Like industry, institutions of higher education have generally accepted a youth-oriented, age-decremental model of human resource development. While industry remains preoccupied with very specific job skills, colleges could certainly adopt a more comprehensive model of life-span development, and provide education accordingly. Given such a model, it might be possible for people beyond age fifty to become re-educated, to learn a whole new career. Instead of thinking of themselves as on a downward slope toward retirement, they could think about beginning a new phase of life.

John McLeish, in *The Ulyssean Adult,* has documented a range of examples of creativity, continued learning, and second careers in later life. In a few cases, educational institutions have responded to this possibility with innovative measures, such as the successful program at the Harvard Graduate School of Education, which offers mid-career retraining that permits engi-

neers—average age fifty—to become high-school science and math teachers.

The key problem with this optimistic picture of second careers in later life is motivation. What prompts people to take the risk? One answer is that certain life changes—divorce, or plant closings in smokestack industries—often impel people to give up old patterns and take the chances necessary to begin new occupations in mid-life.

In 1976, for example, the Vocational Education Act turned federal attention for the first time to the educational needs of middle-aged displaced homemakers.[6] ("Displaced homemaker" refers to a person who, through divorce, separation, or the death or disability of a spouse, finds herself needing to move back into the job market at age forty or more.) This national effort at retraining has demonstrated the feasibility of public initiatives to build on the capacities of age and experience.

The successful programs have provided practical skills training in such areas as personal financial management or job-search techniques. They have also been helping older women to translate their knowledge from life experience in homemaking or volunteer work into paid employment. Local chapters of the Older Women's League, often in collaboration with community colleges, now offering training programs on financial and retirement planning, housing, health needs, and family life, as well as skills acquired in leadership development and advocacy training.

HUMAN-CAPITAL INVESTMENT IN LIFE-SPAN PERSPECTIVE

If we are to insure economic productivity and growth in a competitive international economy, technological innovation is a necessity. At the same time, there are serious doubts whether high-technology skills will provide the kind of career flexibility that we have been advocating over a longer life span; in many ways, it may actually contribute to de-skilling and even trivializing jobs. New technology can also cause older workers to lose the advantages of age and experience, increasing their fears of being replaced by automation.

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[6] I am indebted to Cindy Marano for background information on the Displaced Homemaker Programs.

The public policy response to this situation has been inadequate and even misdirected. Under the old Trade Adjustment Act, for example, initiatives have largely failed, and little retraining of older workers has even been attempted. Further, the federal tax code prohibits those engaged in retraining for a new occupation from claiming an educational deduction, while it permits deductions for those who improve their skills within their current occupations. Even the recent Job Training Partnership Act represents a meager response to the structural transformation of the American economy. Federal leadership will achieve little indeed unless it provides serious incentives in the form of training subsidies, tax credits, new adult retraining services, and other such programs. Prevailing policy fails even to address these questions.

Financing Retraining for Older Workers

Some recent proposals approach the task of financing worker retraining in novel ways. Under one, which calls for so-called Individual Training Accounts financed by joint contributions from workers and companies, a worker could draw upon an account if he found himself displaced from a job. Still more ambitious plans would offer general educational entitlements, based, for example, on Social Security, to be set aside for use at any period of the life course. Such policies would weaken the grip of the linear life plan, and might promote greater occupational mobility for middle-aged and older workers.

One liability of these plans is that they would appeal primarily to upper-income workers; people with more modest incomes, who could not benefit from tax incentives, are less likely to participate.

There is also the fact that, for those older workers who have built up significant equity in home ownership but now face high mortgage rates if they try to move, relocation assistance is as vital as retraining. Current policy in effect subsidizes immobility and inflexibility in an aging labor force—a major problem in a post-industrial economy, where mobility and flexibility are essential for growth.

Public Policy for Life-Span Development

Because of the historical geographic mobility of the American labor force, our private firms and local governments have under-invested in education and training compared with other industrialized countries. Under-investment was traditionally tolerated because companies could recruit younger workers who had acquired the necessary skill levels through public education. Here is an instance of the limitation of the human-capital investment perspective as applied to worker retraining: it is unrealistic to expect either private firms or local governments to make investments if they cannot expect to recoup benefits. In a period of "hypermobility" of international capital, it is easier for industries simply to abandon a local area when their human resource costs become excessive.[7]

The effect of our current national policy is to offer incentives for economic dependency in retirement through pension and Social Security transfers. In contrast, our local and private policy bears the entire burden of offering incentives for human-capital investment. The result is that individuals and private firms alike end up supporting publicly subsidized dependency while avoiding risky human-capital investments in retraining older workers. The aging society, then, confronts a contradiction: increased longevity means an abundance of life in the later years with a potential for continued social productivity, yet the political economy channels older people away from productive roles in the workplace.

Work, Aging, and Post-Industrial Society

Many observers express deep pessimism about future job growth in advanced industrialized economies. On the one hand, new technology is needed to insure healthy productivity, while, on the other, an aging work force is threatened by skill obsolescence or by the vanishing of jobs altogether. We can anticipate that many older people will resist innovation and be reluctant to take risks, while employers will continue to maintain

[7] Michael Harrington, *The New American Poverty* (New York: Holt, Rinehart, & Winston, 1984). Barry Bluestone and Bennett Harrison, *The Deindustrialization of America: Plant Closings, Community Abandonment and the Dismantling of Basic Industry* (New York: Basic Books, 1983).

inelastic salary levels and job rationing by age and seniority.

As we move away from the concept of the linear life plan, we also move away from security and predictability. One response to an unpredictable world has been a version of *protectionism:* for example, guarantees of lifetime job-security. Western European societies, with their aging populations, have already begun to experience the long-range cost of the protectionist strategy, a defensive response that often results in an inflexible labor force, and the setting of the old against the young. A better response would be to promote skills of adaptation and development over the entire life course. Instead of regarding older workers as unproductive burdens, we would invest in their retraining as a way of developing their abilities to contribute in many different settings.

LIFELONG LEARNING IN THE AGING SOCIETY

Adult Learners and Non-Traditional Education

The coming of an aging society is likely to accelerate the trend toward "non-traditional" higher education. American higher education has already demonstrated impressive flexibility in its ability to reach out to adult learners. The main thrust of the innovation to date has been to remove the most obvious barriers to adult learners [8]—by providing evening programs, weekend colleges, and initiating outreach efforts to bring education to sites beyond the limited time and place of the traditional campus. But these separate programs never quite achieve parity with the standard educational offerings; they always remain examples of "learning at the back door." [9] The academic mind persists in making status distinctions between regular education and continuing education, between credit and non-credit offerings, distinctions that are reinforced by educational policy and financing patterns.

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[8] I am indebted to Russell Edgerton, president of the American Association for Higher Education, for background information provided at the Conference on Education and the Aging Society.

[9] Charles A. Wedemeyer, *Learning at the Back Door: Reflections on Non-Traditional Learning in the Lifespan* (Madison, WI: University of Wisconsin Press, 1981).

Other issues may be far more important for older learners than simply promoting access. For one, the pedagogical traditions of the university are not always compatible with the active learning interests and the individual learning styles of adults. With the process of aging, people become more, not less diverse, a condition that gives rise to conflict between the expectations of experienced adults and the curriculum of most post-secondary institutions.

We must take care not to be deceived by the conventional assumptions of assessing educational needs. Patricia Cross has reminded us that the results of surveys of perceived educational demands are always related to a respondent's prior experience with education;[10] people really have no sense of what their need for education might be until they actually experience a concrete alternative program and are able to measure the difference. The successful experience of the Open University in Great Britain has demonstrated this point. Educational innovation for an aging society will demand not merely *access* to predetermined programs and materials, but *redesign* of those offerings to meet the needs of learners who bring with them the special strengths of age and experience.

Education for Older Adults

There is abundant evidence that people can continue to learn at any age. As successive generations of older people continue to show rising levels in the years of schooling they complete, we can expect interest in lifelong learning to grow in the future.[11] Today, comparatively few older people are enrolled in formal education, and the degree of their participation is correlated to their prior educational attainment, a pattern that holds true at all ages. But the participation rates of older adults are rising. The 1974 Harris Survey recorded only 2 percent engaged in adult education, while the 1981 Survey identified 5 percent.

Older learners tend not to be interested in credentials or degrees; tests, grades, and competition hold little at-

[10] K. Patricia Cross, *Adults as Learners: Increasing Participation and Facilitating Learning* (San Francisco: Jossey-Bass, 1984).

[11] The best overall treatment of education in later life is David Peterson, *Facilitating Education for Older Learners* (San Francisco: Jossey-Bass, 1983).

traction for them. The fields they pursue range widely, from the arts or methods of coping with social change, to programs that teach information about hobbies, physical health needs, and personal growth. They tend to prefer the kind of participative learning that allows them to be involved and active, as opposed to courses presented in the typical lecture format. The most effective programs have been those that respond directly to the special interests of older learners.

One example of a successful program is "Elderhostel," which was founded in 1975 as a summer residential college program for people over sixty. It offers noncredit courses in the liberal arts and sciences. Elderhostel's growth has been extraordinary. It began with two hundred participants, and by 1985 nearly 100,000 were enrolled at eight hundred campuses around the United States. Elderhostel is now both a year-round option and an overseas activity. One of its key features is its residential format, and the fact that it offers an opportunity for travel. The residential program provides a degree of intimacy and socialization that is an important part of the program as a whole. Elderhostel entails no homework, no papers, and no grades; participants enroll simply for the joy of learning. Its participants enjoy a new retirement lifestyle that reinforces feelings of self-worth and personal growth.

In many ways Elderhostel resembles the American Chattauqua Movement, now revived in the era of the aging society. The trend it demonstrates is worldwide in nature, as is evident in the spread of the "Universities of the Third Age" in France, Spain, Scandinavia, and, more recently, Japan. The phenomenon suggests further possibilities for the future of higher education in an aging society. College faculty members are increasingly troubled today about declining skills, poor motivation, and an almost single-minded focus on career-orientation on the part of their younger students. At many American campuses, professors compete to teach in Elderhostel, because older students, with their rich life experience, have proved themselves ideal audiences for liberal education.

While the socioeconomic status of Elderhostelers tends to be above average, we should not assume that liberal education can appeal only to the upper-middle-classes. Other program models exist as well:

The Senior Center Humanities Program, sponsored by the National Council on Aging, brings humanities learning to senior citizens in local neighborhood settings. It is funded by the National Endowment for the Humanities and relies on local discussion groups conducted by voluntary leaders at senior centers, nursing homes, nutrition sites, and other community locations. Groups focus on such subjects as "The Remembered Past: 1914 to 1945," and "Exploring Local History."

The program continues high-quality texts with a sensitivity and awareness about adapting materials to local interest. Carefully prepared anthologies serve as a basis for discussions and include selections from literature, philosophy, autobiography, folklore, and the arts. While using materials that are nationally produced and distributed, the Humanities Program has demonstrated its appeal to widely diverse groups of elderly people. The educational and socio-economic profile of its 75,000 participants is virtually identical with a profile of the U.S. population over age sixty-five.

One of the greatest challenges America faces in the transition to an aging society is how to increase the availability and the quality of services in a period when government funding is tighter than ever. The answer may be found in educational programs that help older people learn skills for self-sufficiency to cope with the problems of aging. A last example suggests the potential of late-life education for encouraging productive roles for older people outside the marketplace.

The *Senior Health and Peer Counseling Center* of Santa Monica, California combines older-adult education with organized self-help groups. Classes and workshops are focused on blood-pressure control, nutrition, stress management, exercise, and health education. Health screening and referral services, linked to nearby hospitals, are also available. The Santa Monica Center is nationally known for recruiting and training peer counselors, elderly people who work with other older people in emotional distress.

The Santa Monica Program illustrates the potential of older people to learn new skills when the motivation and the opportunity are present. Institutions, professionals, volunteers, and self-help groups all collaborate in a comprehensive approach. What the experience suggests is that more institutional and professional support

could encourage other programs that build on the capacity for self-help and self-change in later life. Any list of the concerns of the elderly today would have to include health care, nutrition, crime prevention, and long-term care. These are areas where government at all levels has tried to respond, but typically the response has been only to provide more services for people in immediate need, with never enough money to provide services for all who actually need them. In health care, for example, we spend billions of dollars on treatment, but virtually nothing on preventing illness or on teaching older people how to care for themselves.

An alternative strategy would be to invest in educating older people to do more for themselves. Education for older people is sometimes viewed as a "frill," a view that seems short-sighted indeed, especially at a time when the "self-help ethos," as Frank Riessman has called it, is growing rapidly as mutual self-help groups have proliferated;[12] by some estimates, they now involve over 15 million Americans. Mutual-aid groups are especially appropriate for certain concerns of old age—widowhood, vulnerability to crime, and coping with chronic illnesses such as arthritis, hypertension, and diabetes, for example. Their experiential learning style offers an approach to education that is tied to concrete motivation for change. Instead of a "hard path" of constantly expanding services for a dependent population, we would opt for a "soft path," where education through self-help builds coping skills along with self-esteem.

The hard path is not only expensive; it also reinforces the "learned helplessness" of old people in the face of bureaucracy and professional interventions. By contrast, the soft path provides new skills and knowledge to make older people productive in ways that are not measured by the marketplace. Perhaps the most exciting potential of self-help lies in its possibilities for encouraging older people and professionals alike to transform their images of what "dependency" or "productivi-

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[12] Alan Gartner and Frank Riessman, *The Self-Help Revolution* (New York: Human Sciences Press, 1984).

ty" in old age might mean, a critical step in refashioning social policy for an aging society.[13]

SCENARIOS FOR THE FUTURE

Beyond the Linear Life Plan

Willard Wirtz, among others, has argued against the linear life plan, with its rigid separation of learning, work, and leisure.[14] Indeed, survey data suggest that most Americans would prefer alternative work schedules: not merely schedules that make working time more flexible, but those that radically break up the three "boxes" of life. In one survey, 80 percent of respondents favored some version of a "cyclic" life plan—that is, one that offered reduced schooling during youth, more flexible retirement, and greater options for education and leisure throughout the life course.[15]

Individual preferences aside, there are convincing policy-based arguments for favoring a more flexible life course: as a way to reduce the rising cost of student-aid dependency; as a device to avert financial threats to Social Security; and as an incentive to engage people in productive work during more years of life. Why, then, has employment been progressively compressed into the middle period of life? The real answer, it appears, is that our economy is not structured to create enough jobs for youth and for those elderly who want to work. It is pressures to achieve higher levels of productivity which require the intensive use of skilled human resources during the middle period of life. The linear life plan, far from being based on the mere "human convention" that Wirtz decried, is sustained by the most deeply rooted drives of the advanced industrial economies—the impetus towards maximizing profits and promoting efficiency.

While it is true, therefore, that flexible work schedules have come to be adopted at the margin, it is worth noting that total hours in the work week have not

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[13] Peter Townsend, "The Structured Dependency of the Elderly: A Creation of Social Policy in the 20th Century," *Ageing and Society*, March 1981, pp. 5–28; Alan Walker, "The Social Production of Old Age," *Ageing and Society*, Nov. 1983, pp. 87–95.

[14] Willard Wirtz, *The Boundless Resource* (Washington, DC: New Republic Book Co., 1975).

[15] Survey by Fred Best, cited by Robert Hamrin in his *Managing Growth in the 1980s* (New York: Praeger, 1980), p. 282.

fallen since World War II, even though the years of completed schooling have risen, and the average age of retirement has dropped. These long-term trends suggest that there may be limits to just how far the linear life plan can be modified. If this conclusion is true, then it follows that much more attention should be devoted to education for *non*-monetized forms of productivity for older people. Retraining for paid employment will remain an important option, but clearly it should not become the exclusive criterion for policy.

The Information Economy

The structure of the century-old "modernized" life course is now being reshaped by new economic forces as America becomes a post-industrial information economy. In turn, education will be broken down into new categories corresponding to a new economic imperative for the production and distribution of knowledge:

—the formal educational system, which is the largest sector of the human services and provides the principal occupation for most people during the first quarter of their lives;

—a parallel but "invisible" instructional system sponsored by business and industry, now operating on a scale that exceeds the total expenditures for formal higher education;

—the still more informal and widely dispersed learning systems that we identify with publishing, mass media, culture, entertainment, and the communications industry.

Each of these segments of the information economy promotes learning over the life course, but each does so in very different ways and with different policies and purposes. Roughly speaking, each of these subsectors of the knowledge industry can be correlated with the "modernized" life cycle, that is, with the life stages of youth, midlife, and old age. Thus, the formal education system, with the near-monopoly it wields over the uses of time during the first quarter of life, has concentrated on youth. Business and industry have concentrated on the second quarter of life, but have largely ignored middle-aged and older workers.

Finally, we have the informal learning system that occupies an increasing part of most people's lives. Older people are linked to the information economy chiefly

through the mass media. The elderly watch television more than any other age group, and for many old people TV provides the major leisure activity of their lives. The advent of an information economy, then, has not fundamentally altered the "modernized" life cycle, with its segmentation of education, work, and leisure. Apart from the informal learning system, major institutions have neglected to provide—or even to conceive of providing—learning for people in the third quarter of life or beyond.

Those analysts who have seen the outlines of a "learning society" in the new post-industrial economy are surely correct; the role of knowledge workers, the primacy of human-capital formation, and the spread of an information economy are all trends likely to favor lifelong learning. But this version of lifelong learning may not mean that greater resources are available for the formal educational system. On the contrary, it is industrial training and the informal learning system that may become the primary educational channels, drawing funding away from the formal system. This could mean a loss in our capacity for long-range thinking about human resources, a loss that would be particularly damaging in an aging society.

The Need for a Long-Range Perspective

The formal educational system—our schools and colleges—still represents the central vehicle that we have for developing human resources in our society. For a period of nearly two decades, on average, we turn over our children and young people to institutions charged with developing those capacities that will sustain them throughout their lives.

Here the contrast with corporate education and training is striking. With rare exceptions—such as IBM or Xerox—American business enterprises do *not* approach employee training with a long-range view to nurturing skills and abilities. Short-range thinking prevails. In an aging society, we will begin to pay the price for this limited view of human development, in the same way that American business is now recognizing the limits of short-range thinking tied only to the current year's balance sheet.

It would be less damaging if this kind of short-sighted, present-oriented thinking were characteristic of

business and industry alone. Unfortunately, higher education has been guilty of it too, both in the "marketing" orientation of continuing-education offerings, and in the very narrow career-education programs that have displaced liberal education in many colleges and universities. Early specialization to gain an advantage in today's market leaves students ill-equipped to develop deeper and more widely ranging capacities as they grow older.

Yet the extended life span, combined with the obsolescence of so much knowledge, means that the time frame will have to be stretched still further. If a fifty-year-old worker still has twenty years of work life and perhaps a full thirty or thirty-five years of life expectancy ahead, then short-run thinking no longer makes sense.

Life-Span Development or Market Imperatives?

There is no longer any question about the ability of older adults to learn or to benefit from education, but there is an astonishing lag between what is now known about development over the life span and what our major social institutions prescribe for the different stages of life. Our traditional images tell us that youth, not age, is the time for learning, and the new boom in non-traditional learning has not really challenged that traditional image. Instead, we have expanded our image of youth into middle adulthood, and the advent of continuing education has introduced market imperatives while driving out human development goals at every turn.

The effect of market imperatives has been to extend the dominance of credentialism over the entire life course. This is not human development so much as it is defensive education in a competitive job market. In a period of rapid social and technological change, this middle-class style of lifelong learning becomes increasingly necessary for those who wish to get ahead or to appear well-informed; it is a style of adult education that may allow little room for older learners, for it regards them as superfluous to the tasks within the economic system. Unlike education for the young, education for the older adult is not perceived as a necessity for the maintenance of society. From this credential-obsessed perspective, old people may pursue education, but it is strictly a private pursuit for leisure-time activity, with no larger meaning or purpose. Here we see a

view of old age as a phase of life that is separated from past and future generations, and finally cut off from any shared future.[16] It is the persistence of this view that feeds our secret despair about the last stage of life.[17]

The most gloomy scenario would perceive the aging society as an *age-polarized* society, with older and younger generations pitted against one another by opposing interests. Diminishing numbers of children would mean that support for public education would decline, while late-life education would remain a private affair among the elite. In this scenario, both higher education and business move increasingly towards a human-capital model of learning under the control of private decision-makers. While an enlarged information economy would provide unending entertainment to distract the very young and the very old, short-term interest would be determined solely by marketing considerations.

An alternative scenario would envision the aging society as a society where education at last becomes a lifelong enterprise, an opportunity for both young and old. The "three boxes of life" would give way to an ideal of continuing human development that extends over the entire life course. This ideal implies a vast expansion of retraining for middle-aged and older workers, just as it calls for a redesign of educational curricula to take account of the rich experience of older learners.

The greatest difference between these two scenarios lies not so much in their differing economic forecasts as in a fundamental question of values. Is the new abundance of life now produced by gains in longevity to be regarded as a problem or an opportunity? Are younger and older generations simply "interest-groups," or are all generations bound in obligations toward a common good? The experimentalism and vitality of American education at all levels has always been based on a shared public vision of individual opportunity working towards the common good. That history gives some reason to hope that the aging society will rediscover opportunities for learning in each of the stages of life.

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[16] See the chapter on "Old Age" in Christopher Lasch, *The Culture of Narcissism* (New York: W.W. Norton, 1977).

[17] On ego-integrity versus despair in old age, cf. Erik Erikson, *Insight and Responsibility* (New York: Norton, 1964) and Erikson, *The Life Cycle Completed: A Review* (New York: Norton, 1982).

APPENDIX B

QUIZZES PREPARED BY THE NATIONAL INSTITUTE ON AGING

What Is Your Aging I.Q.?

True or false?

1. Everyone becomes "senile" sooner or later, if he or she lives long enough.
2. American families have by and large abandoned their older members.
3. Depression is a serious problem for older people.
4. The numbers of older people are growing.
5. The vast majority of older people are self-sufficient.
6. Mental confusion is an inevitable, incurable consequence of old age.
7. Intelligence declines with age.
8. Sexual urges and activity normally cease around age 55–60.
9. If a person has been smoking for 30 or 40 years, it does no good to quit.
10. Older people should stop exercising and rest.
11. As you grow older, you need more vitamins and minerals to stay healthy.
12. Only children need to be concerned about calcium for strong bones and teeth.
13. Extremes of heat and cold can be particularly dangerous to old people.
14. Many older people are hurt in accidents that could have been prevented.
15. More men than women survive to old age.
16. Deaths from stroke and heart disease are declining.
17. Older people on the average take more medications than younger people.
18. Snake oil salesmen are as common today as they were on the frontier.
19. Personality changes with age, just like hair color and skin texture.

20. Sight declines with age.

Answers:

1. False. Even among those who live to be 80 or older, only 20–25 percent develop Alzheimer's disease or some other incurable form of brain disease. "Senility" is a meaningless term which should be discarded.

2. False. The American family is still the number one caretaker of older Americans. Most older people live close to their children and see them often; many live with their spouses. In all, 8 out of 10 men and 6 out of 10 women live in family settings.

3. True. Depression, loss of self-esteem, loneliness, and anxiety can become more common as older people face retirement, the deaths of relatives and friends, and other such crises—often at the same time. Fortunately, depression is treatable.

4. True. Today, 12 percent of the U.S. population are 65 or older. By the year 2030, one in five people will be over 65 years of age.

5. True. Only 5 percent of the older population live in nursing homes; the rest are basically healthy and self-sufficient.

6. False. Mental confusion and serious forgetfulness in old age can be caused by Alzheimer disease or other conditions which cause incurable damage to the brain, but some 100 other problems can cause the same symptoms. A minor head injury, a high fever, poor nutrition, adverse drug reactions and depression can all be treated and the confusion will be cured.

7. False. Intelligence per se does not decline without reason. Most people maintain their intellect or improve as they grow older.

8. False. Most older people can lead an active, satisfying sex life.

9. False. Stopping smoking at any age not only reduces the risk of cancer and heart disease, it also leads to healthier lungs.

10. False. Many older people enjoy—and benefit from—exercises such as walking, swimming, and bicycle riding. Exercise at any age can help strengthen the heart and lungs, and lower blood pressure. See your physician before beginning a new exercise program.

11. False. Although certain requirements, such as that for "sunshine" vitamin D, may increase slightly

with age, older people need the same amounts of most vitamins and minerals as younger people. Older people in particular should eat nutritious food and cut down on sweets, salty snack foods, high-calorie drinks, and alcohol.

12. False. Older people require fewer calories, but adequate intake of calcium for strong bones can become more important as you grow older. This is particularly true for women, whose risk of osteoporosis increases after menopause. Milk and cheese are rich in calcium as are cooked dried beans, collards, and broccoli. Some people need calcium supplements as well.

13. True. The body's thermostat tends to function less efficiently with age and the older person's body may be less able to adapt to heat or cold.

14. True. Falls are the most common cause of injuries among the elderly. Good safety habits, including proper lighting, nonskid carpets, and keeping living areas free of obstacles, can help prevent serious accidents.

15. False. Women tend to outlive men by an average of 8 years. There are 150 women for every 100 men over age 65, and nearly 250 women for every 100 men over 85.

16. True. Fewer men and women are dying of stroke or heart disease. This has been a major factor in the increase in life expectancy.

17. True. The elderly consume 25 percent of all medications and, as a result, have many more problems with adverse drug reactions.

18. True. Medical quackery is a $10 billion business in the United States. People of all ages are commonly duped into "quick cures" for aging, arthritis, and cancer.

19. False. Personality doesn't change with age. Therefore, all old people can't be described as rigid and cantankerous. You are what you are for as long as you live. But you can change what you do to help yourself to good health.

20. False. Although changes in vision become more common with age, any change in vision, regardless of age, is related to a specific disease. If you are having problems with your vision, see your doctor.

What's on Your Mind?

A QUIZ ON AGING AND THE BRAIN

1. "You can't teach an old dog new tricks" is a saying—

   a. that recent scientific experiments have shown is true for older people.

   b. that only applies to dogs, cats, and other non-human species.

   c. that is outdated and scientifically incorrect.

2. How does aging affect intelligence?—

   a. Brains in older people don't work as fast, but knowledge based on experience grows in later life.

   b. Older people are really more intelligent because they have been using their brains for so many years.

   c. Older people don't learn as much as they did when they were younger.

3. Creativity in old age is—

   a. enhanced by experience.

   b. a lost art.

   c. difficult because of changes in the brain.

4. Depression is a problem for many older people. The condition is—

   a. acceptable, given their age and illnesses.

   b. just a normal part of growing older and can't be reversed.

   c. frequently treatable once its cause is pinpointed.

5. Psychotherapy, or "talk" therapy, for people over age 65 is—

   a. a waste of time. People that age don't have much time left.

   b. a good idea. At age 65, people continue to live a long time, making it even more important that they seek help for mental health problems.

   c. a waste of effort. Older people are so set in their ways that there really isn't much point in trying to deal with their mental health problems.

6. Nerve cells in the adult brain gradually die over the years. What is the result?—

a. It means that memory loss in old age is inevitable.

b. Not much, because people continue to learn as they grow older.

c. Over time—and with a proper diet, physical excrcise, and mental stimulation—the brain replenishes the nerve cells it loses.

7. Which of the following has been shown to cause Alzheimer's disease in some patients?—

a. alcohol or drug abuse.

b. aluminum deposits in the brain.

c. a genetic defect in some families.

d. lack of education.

8. Most typically, memory loss in older people is caused by—

a. Alzheimer's disease.

b. too many things to remember.

c. a variety of factors, such as over medication or illness.

9. Which of the following is true?—

a. Alzheimer's disease can be cured if diagnosed early enough.

b. Alzheimer's disease can be treated to slow the progress of the disease.

c. there is no known cure for Alzheimer's disease.

10. What is the best method for conclusively diagnosing Alzheimer's disease?—

a. the Myers-Briggs personality test.

b. a diagnostic blood test.

c. psychiatric evaluation.

d. tissue analysis after death.

11. True or False?—Solving puzzles and other "mental gymnastics" can keep the aging brain healthy.—

a. False. Mental exercises won't keep your brain sharp in later life.

b. True. Intellectual and creative pursuits help adults avoid dementing diseases.

c. Neither. The value of mental exercise for brain fitness has yet to be demonstrated.

12. Personality changes in later life are—

a. rare in healthy people. People stay pretty much the same throughout life.

b. normal because experience makes people very different than they were as children and young adults.

c. inevitable because people become cranky and difficult as they age.

13. Dreading death is a preoccupation among—

a. older adults who, as they grow yet older, see friends dying.

b. many healthy adults in middle age who are struggling with "midlife crisis."

c. both of the above.

14. The risk of suicide for people age 65 and older is—

a. the lowest of all age groups.

b. the highest of all age groups.

c. too small to be measured.

15. True or False?—Older people worry too much.—

a. False. Worry is not really a characteristic of old age.

b. True. People become much more anxious as they age.

16. A "tip-of-the-tongue" (TOT) experience—when you know a word or name but just can't seem to retrieve it from your memory—

a. is always a sign of Alzheimer's disease in an older person.

b. is usually a temporary glitch.

c. means that once you have forgotten a name or word, you will never remember it again quickly.

17. Sexual problems in older adults—

a. are a normal part of aging. Women lose interest in sex after menopause and men are often impotent.

b. are mostly caused by emotional or mental health problems.

c. are caused by changes in brain function which affect parts of the brain associated with sexual satisfaction.

18. By the middle of the 21st century, unless research can bring new breakthroughs, the number of people with Alzheimer's disease—

a. will equal the 1990 population of the Los Angeles metropolitan area (about 14 million).

b. will equal the 1990 population of the city of Chicago (almost 3 million).

c. will equal the 1990 population of the Philadelphia area (almost 6 million).

19. A stroke is a sudden disruption in the flow of blood to the brain. The likelihood of a stroke can be reduced—

a. by quitting smoking, adopting sensible eating habits—low cholesterol and low fat diets—and controlling high blood pressure.

b. by keeping under control and not allowing a bad temper to explode.

c. somewhat. Research shows that the death rate from stroke has fallen only slightly despite preventive measures.

20. Many older people complain that they don't sleep as well as they used to. Their sleep may be troubled because—

a. they take more medications.

b. they are anxious about retirement and other major life changes.

c. they have a variety of medical problems, such as arthritis or cardiovascular disease that are common with age.

d. all of the above.

Answers:

1. *c.* Older adults can and do learn new skills relatively easily. In fact, in properly designed programs, older individuals can benefit from training as much as, and sometimes more, than younger people.

2. *a.* Experience-based intelligence remains stable or improves slightly well into late adulthood. In many jobs, the expertise of older workers allows them to be among the safest and most productive employees. The speed and efficiency of processing information can decline, however, with increasing age. Recent scientific experiments show that, with practice, older adults can reverse some of these effects.

3. *a.* Picasso painted until his death in his 90's and Grandma Moses kept painting until she died at age 101. In addition, many not-so-famous older adults take on second or third careers, try new hobbies, or begin closer interpersonal relationships after age 65.

4. *c.* Depression can be treated successfully and should be taken seriously because it is a major risk factor for suicide. It is not a normal part of aging, al-

though many older adults suffer from it. Adverse drug reactions, illness, certain life events, and other factors can cause older people to become depressed.

5. *b.* Psychotherapy ("talk" therapy) has proven successful for older people and its benefits can last for many years. At age 65, people continue to live an average of 16.8 years. Those over age 85 represent the fastest growing age group.

6. *b.* It is true that nerve cell loss begins by about age 2 and progresses throughout life. But normal nerve cell loss is not believed to have a significant effect on overall performance because people continue to learn as they age. Excessive nerve loss associated with illness can cause problems.

7. *c.* Studies indicate that a small but important percentage of Alzheimer's disease patients come from families in which the disease occurs more often than in the general population. This suggests that genetic factors play an important role in those families. Scientists have not yet been able to establish how much of a role genetics plays in the vast majority of families, however, and they have yet to identify other factors causing the disease.

8. *c.* Memory loss in older people can have many causes, and often can be treated. While Alzheimer's disease or other dementing disorders can cause memory loss, other factors can include depression, reactions to some drugs, and head injury.

9. *c.* There is no known cure for Alzheimer's disease, but much can be done to treat the symptoms of the disease that cause suffering and discomfort. Several medical or social interventions can be used, including drug therapy for depression and simplifying the patient's environment.

10. *d.* A diagnosis of Alzheimer's disease can only be confirmed by autopsy after death. In the living patient, the diagnosis is strongly suggested only after all other possible causes of dementia are systematically ruled out.

11. *c. Neither.* Scientists have not proven that "mental gymnastics" can keep an aging human brain healthy that otherwise might have begun to decline, but they have found there might be some benefit to "exercising" the brain. Laboratory research shows that animals in stimulating environments can release chemicals

in their brains related to keeping nerve cells healthy and active.

12. *a.* When an older person shows significant personality or behavior changes, it is usually a signal that something else is wrong. For example, a new, growing hostility in relationships with others can mask serious, hidden depression.

13. *b.* A dread of death is not typical for healthy older adults. When it occurs in older people, it is usually related to depression or a struggle with terminal illness. In healthy adults, a fear of death is actually more common in middle age.

14. *b.* The risk of suicide rises with age. Older white males are the group most at risk.

15. *a.* False. For the vast majority of older adults, worry is not a problem. One recent study of people in their 90's found that over 70 percent report that they are in good spirits, never feel lonely, and are free from worry.

16. *b.* TOTs are often just temporary mental glitches, although word finding problems may be slightly more frequent among older adults. Scientists are studying TOTs to see how the brain stores and retrieves information, hoping to explain a range of language and memory problems, such as those that occur after a stroke. In some cases, however, word finding problems can be a sign of Alzheimer's disease. Older adults should be monitored closely to see if word finding becomes a serious difficulty.

17. *b.* Emotional state plays a greater role than normal aging changes in causing sexual problems in older adults. Depression can significantly interfere with sexual interest, motivation, and fantasy life in one's later years. It is one of the most common causes of impotence in older men and is treatable.

18. *a.* About 4 million people now have Alzheimer's disease. That number could exceed 14 million by 2040 without significant scientific progress on the causes of the disease and possible treatments.

19. *a.* These approaches have been so successful that the death rate from stroke has fallen as much as 50 percent since 1970. The decline also has been due to more advanced diagnostic tests and treatments.

20. *d.* Although the quality of sleep can change as people age, most older people spend the same amount of

time sleeping as they did when they were younger. Good sleep habits, including exercising, avoiding alcohol and caffeine, and going to sleep at the same time every night, can help with troubled sleep.

(This quiz is the brainchild of Gene D. Cohen, M.D., Ph.D., Acting Director of the National Institute on Aging (NIA), and is based in large part on the work of NIA scientists and grantees. This research has contributed to understanding that societal stereotypes about aging are based on confusion between what is normal aging and the diseases frequently associated with advancing age.)

APPENDIX C

A Synopsis of Major Federal Statutes Providing Assistance for Continuing Education

(Kevin B. Greely, Legislative Attorney, American Law Division, Congressional Research Service, Library of Congress)

The following is a brief summary of the major Federal statutes which authorize the provision of Federal assistance for adult and continuing education programs. Generally these statutes authorize Federal assistance to be provided to an appropriate State agency (*e.g.*, the State Educational Agency) which distributes the funds to local governmental agencies and other public and private entities to actually operate the programs. Although only a few of the laws authorize these programs to be provided specifically to the elderly, elderly individuals are generally eligible to take advantage of the services if they meet the requirements for program participation.

Adult Education Act (20 U.S.C. § 1201)

The Adult Education Act provides a means by which adults, including older adults, may obtain the basic educational skills needed to function in society. The Act authorizes a number of programs in which grants are awarded by the Department of Education to State and local, public and private institutions to assist in the development and operation of adult education activities including: "basic grants" to assist the States in their funding of adult education programs and services (including services to be provided to persons at correctional institutions and other institutionalized persons); grants to public-private partnerships to develop "workplace literacy training" programs; grants to States for the development and operation of services for persons of limited English proficiency; and grants to assist in the implementation of various nationally oriented programs.

Part B of the Act establishes the "basic grants" program under which the Secretary of Education is authorized to "make grants to States to assist in funding adult education programs, services, and activities" carried out by local educational agencies (*e.g.,* local boards of education) and public and private nonprofit agencies, institutions and organizations. Each State receives an initial allotment of $250,000 (Guam, American Samoa, the Northern Mariana Islands, the Virgin Islands, and the Trust Territory of the Pacific Islands are given a $100,000 allotment) and an additional allotment based on the percentage of adults within the State who do not have high school diplomas (or its equivalent) and who are not currently required to be enrolled in secondary school relative to the total number of such persons in all States. To receive the allotment, States are required to submit a "State Plan" for the provision of adult education services during the period for which the plan is in effect. In addition, the State must designate the State educational agency (*e.g.,* the State Department of Education) as the agency solely responsible for the administration and supervision of services funded under the program. Upon receipt of the basic grant, funds are administered to local educational agencies and other public or private nonprofit agencies, organizations, and institutions to actually develop and operate the adult education programs. At least 10 percent of the allotment received by the State education agency must be used to make grants to cover the costs of various education programs for criminal offenders in correctional institutions and other institutionalized persons. An additional 10 percent must be used to make grants to applicants proposing "special projects" involving the utilization of innovative methods, materials, or programs which may have national significance in the delivery of adult education services.

Part C of the Act, authorizes the Workplace Literacy and English Literacy programs. Under the Workplace Literacy program, "demonstration grants" are made to partnerships of business or labor organizations and State or local educational agencies, institutions of higher education or individual schools to provide services to teach literacy skills needed in the workplace. Proposed services for which funds may be awarded under the workplace literacy program include: (1) serv-

ices that provide adult literacy and other basic skills; (2) programs providing adult secondary education services and activities leading to the attainment of a high school diploma (or its equivalent); (3) services which meet the literacy needs of adults with limited English proficiency; (4) programs designed to upgrade or update the basic skills of workers to keep pace with changes in workplace requirements, technology, products, or processes; (5) programs to improve employee communication and problem solving skills; and (6) services to provide education counseling, transportation, and child care services to workers participating in the program.

Under the English Literacy program, grants are made to States which have submitted State Plans (in accordance with Part B) to assist in the States' funding of programs for individuals with limited English proficiency. Of the funds awarded to the State, at least 50 percent must be used to subsidize programs operated by community-based organizations that demonstrate the capability to administer English proficiency programs. In addition, the Secretary is required under the act, subject to the availability of funds, to carry out a program designed to develop innovative approaches and methods of educating persons with limited English proficiency through the administration of grants and the execution of contracts with public and private nonprofit agencies, institutions, and organizations; and to designate the Center for Applied Linguistics of the Office of Educational Research and Improvement as the national clearinghouse for the collection and dissemination of information on innovative literacy education techniques.

Part D of the Act authorizes grants to be made to State and local eligible recipients to assist in the implementation of nationally oriented adult education programs and services. Under this part, the Secretary of Education makes grants to States and local eligible recipients to assist in the development of adult education programs for migrant farmworkers and immigrants. In addition, Part D authorizes the "Adult Literacy Volunteer Training Program" in which grants are provided to State and local eligible recipients to support the planning and implementation of programs designed to train adult volunteers, *especially the elderly*, to participate as tutors in local adult education programs. In order to receive Federal funding for these activities, States must

include a proposal to provide such services in the State Plan required to be submitted to receive assistance under the "basic grants" program.

Allan J. Ellander Fellowship Program (20 U.S.C. § 3081)

Enacted as part of the Hawkins-Stafford Elementary and Secondary Education Amendments of 1988, this provision authorizes the Secretary of Education to make grants to the Close Up Foundation—a nonprofit organization located in Washington, D.C.—to provide financial assistance to economically disadvantaged older Americans and recent immigrants who participate in the Foundation's program of educating individuals about the Federal Government.

Bilingual Education Act (20 U.S.C. § 3281)

This act establishes authority for the Secretary of Education to make grants to local educational agencies, institutions of higher education and private nonprofit organizations to develop and operate programs to teach children in their native language and to enable children of limited English proficiency (and their families) to become competent in the use of the English language. Under Part A of the Act, grant recipients are authorized to use the funds granted to establish, and operate "family English literacy programs" in which parents and out-of-school family members of limited English proficient students are trained to become literate in the English language.

In order to receive funding under the program, eligible recipients (*i.e.,* local educational agencies, institutions of higher education and private nonprofit organizations) are required to submit an application containing information regarding: the number of persons who will be served by the program; activities to be undertaken with the grant and how these activities will promote English literacy; the extent to which persons to be served by the program have been involved in program development; and prior experience of the applicant in providing education services to persons with limited English proficiency. Grants are provided for the development of a family English literacy program for a period of 3 years.

In addition, Part C of the Act authorizes the Secretary to make grants to eligible recipients to assist in the

funding of programs to train educational personnel participating in bilingual education programs.

Carl D. Perkins Vocational and Applied Technology Education Act (20 U.S.C. § 2301)

Enacted in 1990, the stated purpose of the Carl D. Perkins Vocational and Applied Technology Education Act, is to "concentrat[e] resources on improving educational programs leading to academic and occupational skill competencies needed to work in a technologically advanced society." Title I of the Act sets out the allotment of Federal funds which each State is to receive in carrying out various vocational and applied technology education programs authorized under the Act. In addition, Title I authorizes the Secretary of Education to make grants or enter into contracts with Indian Tribes or schools funded by the Bureau of Indian Affairs and organizations representing Hawaiian natives to plan, conduct and administer such programs. Title I also requires States wishing to receive Federal assistance under the act to designate a State Board of Vocational Education to be the sole agency responsible for the administration and supervision of State vocational education programs, and a State Council on Vocational Education to serve in an advisory capacity to the State Board and the Governor.

Title II authorizes the Secretary of Education to make grants to States from funds allotted under Title I to fund State programs to improve the professional development of vocational education teachers and the development of vocational education curricula. In addition, this title requires each State to use a portion of its allotment to develop programs to provide single parents, displaced homemakers, and single pregnant women with marketable skills; to provide vocational education services to juvenile and adult criminal offenders in correctional institutions within the State; and to distribute funds to local educational agencies, area vocational education schools, and institutions offering postsecondary and adult vocational education programs.

Programs authorized under Title III include: programs provided by community-based organizations, consumer and homemaking education, grants for career guidance and counseling activities, grants for vocational education-related partnerships between business, labor,

and educational organizations and agencies; "tech-prep" programs provided by a consortia of local educational agencies and post-secondary institutions; grants for the acquisition and improvement of facilities and equipment; grants for tribally controlled postsecondary vocational education institutions. In addition, Title IV authorizes the provision of Federal assistance for bilingual vocational education and training programs for individuals with limited English proficiency.

Displaced Homemakers Self-Sufficiency Assistance Act of 1990 (29 U.S.C. § 2301)

This act generally authorizes the Secretary of Labor to make grants to State agencies and nonprofit organizations to support the provision of education, employment training, and supportive services to "displaced homemakers." Under the Act, funds are provided to the States in one of two ways depending on the amount of money Congress appropriates to carry out the Act. When the appropriation is less than $25 million, the Secretary of Labor is required to award grants, on a competitive basis, to public agencies and nonprofit organizations that have experience in administering programs that serve displaced homemakers. Recipients of a competitive grant award may use the funds to provide services including; basic skills, literacy, and bilingual training; job development and placement and life skills development. In addition, funds may be used to support statewide "model" programs that provide special services for rural and minority displaced homemakers and women age 40 and older, and for the provision of "nontraditional" or self-employment training.

In years in which Congress has appropriated $25 million or more, the Secretary of Labor is required to allot funds to each State, the amount of which to be based on the number of persons aged 22 to 64 in the State relative to the total population of such persons in the United States. In order to receive the allotment, the Governor of each State must designate one State agency as the "State administrative entity" to be responsible for the receipt and distribution of the Federal funds. Once the funds are received, the State administrative entity is required to award grants, on a competitive basis, to "eligible service providers," which will provide the education, training-related, and supportive services.

Entities which may receive a grant award as an "eligible service provider" include: community-based organizations; local education agencies; postsecondary institutions; institutions of higher education; area vocational education schools; and other institutions designated by the Governor to provide services to displaced homemakers.

Persons eligible to participate in the programs funded under the Act include homemakers: (A) who have been dependent either—(i) on public assistance and whose youngest child is within 2 years of losing eligibility for benefits under the Aid to Families With Dependent Children (AFDC) program, or (ii) on the income of another family member but no longer supported by that income; and (B) who are unemployed or underemployed and are experiencing difficulty in obtaining or upgrading employment.

Domestic Volunteer Services Act (42 U.S.C. § 4950)

The Domestic Volunteer Services Act authorizes a number of programs to assist in the development of community volunteer services throughout the country. Title I of the Act authorizes the Volunteers in Service to America (VISTA) program in which individuals are selected and trained by ACTION (the Federal domestic volunteer agency) to serve, on a full-time basis, as volunteers with public and private nonprofit organizations. At least 20 percent of the applicants selected as VISTA volunteers must be persons age 55 or older.

Title II of the Act establishes the "Older American Volunteer Programs" (comprised of the Retired Senior Volunteer Program, the Foster Grandparent Program, and the Senior Companion Program) in which grants are provided to the State or other public or private nonprofit organizations to fund programs in which older individuals serve as volunteers in various community service projects. Grant recipients under the Retired Senior Volunteer Program are required as a condition of receiving a grant to provide volunteers with "such short term training as may be necessary to make the most effective use of the skills and talents of participating volunteers." In addition, Part C of Title II—governing Senior Companion programs—authorizes the Director of ACTION to recruit senior companion volunteer trainers to train program volunteers to monitor initial

and continuing in-home service needs of the homebound elderly recipients of the program.

Higher Education Act of 1965 (20 U.S.C. § 1001)

Originally enacted in 1965, the Higher Education Act establishes a comprehensive program of financial assistance to students to help defray the costs of acquiring a post-secondary education through grants, insured loans, work-study, fellowships, and scholarships. The Act is administered by the Department of Education.

Title I of the Act authorizes the Secretary of Education to make grants to institutions of higher education to assist in the development and operation of programs tailored to the special needs of "nontraditional students" (*i.e.*, adults). Under Title II, grants are awarded to institutions of higher education for the acquisition and maintenance of needed library resources, including the acquisition of advanced technological equipment. Title III authorizes the awarding of Federal grants which may be used by eligible colleges and universities to generally improve the academic quality and financial stability of the institution.

Title IV of the Act by far comprises the most extensive programs authorized under the Higher Education Act. This title establishes a number of financial assistance programs for eligible students at institutions of postsecondary education to subsidize the cost of attendance at such institutions. Forms of assistance provided for under the act include: Basic Educational Opportunity (or Pell) Grants, Supplemental Educational Opportunity Grants, the Robert C. Byrd Scholarship Program, the Robert T. Stafford Student Loan Program, and the National Direct Student (or Perkins) Loan Program. In addition, Title IV establishes special programs for students from disadvantaged backgrounds and students whose families are engaged in migrant and seasonal farmwork, as well as grants to States to assist in the funding of State student assistance programs.

Other programs authorized by the act include: programs to enhance the recruitment and improve the training of teachers (Title V); grants to institutions of higher education to develop and operate programs to enhance international and foreign language study (Title VI); grants and loans for the construction, reconstruction, and renovation of academic facilities (Title VII);

grants for cooperative education programs (Title VIII); institutional grants and student fellowships for graduate programs (Title IX); grants to institutions for programs to generally improve the provision of postsecondary education (Title X); and grants to postsecondary institutions to encourage partnerships between such institutions and units of local government, labor, business, industry, and community organizations to develop programs which will promote economic and community development (Title XI).

Indian Education Act of 1988, Subpart 3 (25 U.S.C. § 2631)

This Act authorizes the Secretary of Education, through the Office of Indian Education to make grants to State and local educational agencies and to Indian tribes, institutions and organizations to assist in the development of basic literacy programs for Indian adults and programs that will provide such adults opportunities to qualify for a high school equivalency certificate.

Individuals With Disabilities Education Act (20 U.S.C. § 1400)

This act authorizes a number of grants programs to "assure that all children with disabilities have available to them * * * a free appropriate public education which emphasizes special education and related services designed to meet their unique needs * * *" Under Part D of the Act, the Secretary of Education is authorized to make grants to institutions of higher education and other nonprofit organizations to assist in the training of personnel for careers in special education and related services. The Secretary is also authorized under this Part to make grants to nonprofit organizations to provide training programs for the parents of disabled children to enable the parents to participate more effectively in meeting the educational needs of their children.

In addition, Part D authorizes a program in which grants are awarded to the States or to institutions of higher education within the State (where the State fails to submit an application) to assist in the development of programs to train personnel in the skills necessary to meet the education needs of disabled children.

Job Training Partnership Act (29 U.S.C. 1501)

This act authorizes Federal assistance to the States to develop programs "to prepare youth and unskilled adults for entry into the labor force and to afford job training to those economically disadvantaged individuals and other individuals facing serious barriers to employment, who are in special need of such training to obtain productive employment." Under Title II, Part A of the Act, funds appropriated for the fiscal year are allotted to each State according to the number of unemployed and economically disadvantaged individuals within the State relative to the number of such individuals in all States. Upon receipt of the funds, the Governor of the State is required to allocate 78 percent of such funds to "service delivery areas" within the State according to a formula set out under the Act. The remaining 22 percent is required to be set aside to provide minimum funding for certain activities specifically enumerated under the Act; 3 percent of which is required to fund programs that provide job training to "economically disadvantaged" persons age 55 or older. In the provision of funds, the State is required to give consideration to programs that will train eligible persons in skills necessary to acquire jobs in growth industries and jobs in which the use of new technological skills is necessary. Funds not required to be set aside for specific purposes may be used to subsidize a variety of programs under Title II, including: remedial education and basic skills training; institutional skills training; on-the-job training; training programs operated by the private sector; literacy and bilingual training; pre-apprenticeship programs; programs to attain certificates of high school equivalency and others.

Participation in programs funded under Title II is primarily limited to youth and adults who are "economically disadvantaged." (For example, persons receiving cash payments under a welfare program; persons living below the poverty level; persons receiving food stamps; homeless persons; foster children who receive State and local payments; and adult individuals with disabilities who receive welfare or are living below the poverty level.) Up to 10 percent of program participants may not be economically disadvantaged if they have other

barriers to employment such as limited English proficiency, physical disabilities, etc.

Title III of the Act provides authority for the funding of programs that will provide employment and training (or retraining) assistance for persons: (1) who have been terminated or laid off from their jobs, have exhausted their unemployment benefits and are unlikely to return to their previous occupation; (2) persons laid off because of a permanent plant closing; (3) "long-term unemployed" persons who have limited opportunity for reemployment in the same occupation in their area of residence, including older individuals facing barriers to employment because of their age; and (4) previously self-employed individuals who are now unemployed because of general economic conditions in the community or because of natural disasters.

Title IV establishes various employment and training programs to be administered on the Federal level, including programs for: Native Americans (including Indian, Alaskan, and Hawaiian natives) and migrant and seasonal farmworkers (Part A); and veterans with service-connected disabilities, veterans of the Vietnam era, and veterans recently separated from military service (Part C). In addition, Part G of Title IV authorizes assistance to be provided to government contractors wishing to develop training programs that will fulfill their affirmative action obligations. Eligibility to participate in a training program funded under Part G is limited to "economically disadvantaged" individuals, Native Americans, and migrant and seasonal farmworkers.

Library Services and Construction Act (20 U.S.C. § 351)

The Library Services and Construction Act authorizes the Secretary of Education to make grants to States and Indian tribes to improve and extend the services provided by public libraries in areas without such services or where such services are inadequate. Under Title I of the Act, States may use the Federal grant to assist public libraries in the provision of a variety of services including literacy programs for adults and school dropouts. In order to receive the funds, States must submit and have approved a "basic State Plan" outlining the State's proposed program for extending and improving library services.

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Title IV authorizes grants to be provided, upon application, to Indian tribes for services to Indians living in or near reservations. Funds granted under this title may be used for, among other things, "inservice and preservice training of Indians as library personnel" and for special library programs for Indians.

In addition, Title VI of the Act authorizes the Secretary to make grants, of up to $35,000, directly to State and local public libraries to support library literacy programs. State libraries may use funds granted under this title for planning and coordinating literacy programs and to train librarians and volunteers to carry out the program. Local libraries are to use the funds to promote the use of voluntary services of individuals, agencies, and organizations in providing literacy programs; acquisition of materials and the costs incident to the use of library facilities.

National and Community Service Act of 1990 (Pub. L. 101-610)

This act creates a number of programs under which Federal grants are made to States to fund various community service programs. Subtitle D of Title I of the Act authorizes the Commission on National Community Service (also established under the Act) to make grants to States "for the creation of full and part-time community service programs," including a "Special Senior Service" program for which eligibility is limited to persons 60 years of age or older. Organizations sponsoring community service programs funded under the Act are required to provide program participants "program training" in the skills relevant to the work to be conducted.

In addition, Subtitle E of Title I of the Act authorizes the Director of the Peace Corps to establish a training program for eligible persons selected to participate in Peace Corps activities. The Director is also authorized to make grants to such persons to assist in the payment of the cost of tuition, room and board, books, and fees incurred during the participant's final 2 years of study at an institution of higher education.

National Environmental Education Act of 1990 (20 U.S.C. § 5501)

The National Environmental Education Act was enacted to establish and support a program of education on the environment through "activities in schools, institutions of higher education and other educational activities." The Act establishes an Office of Environmental Education within the Environmental Protection Agency which is responsible for administering the programs authorized by the Act. Section 5 of the Act creates an "Environmental Education and Training Program" under which grants are awarded to institutions of higher education to train educational professionals in the development and delivery of environmental education courses. In addition, section 7 of the Act creates an Environmental internship and fellowship program under which postsecondary students receive internships and in-service teachers receive fellowships providing an opportunity to work with professional staff of Federal agencies involved in environmental issues.

Other programs authorized by the Act include: various environmental education awards; creation of the National Environmental Education Advisory Council and the Federal Task Force on Environmental Education; and the establishment of the National Environmental Education and Training Foundation.

National Literacy Act of 1991 (Pub. L. 102-73)

The National Literacy Act of 1991 enhances the authorities and programs provided under the Adult Education Act and creates a number of new programs to provide basic literacy skills to adults. Among the new programs authorized by the Act, Title VI establishes a program under which the Attorney General of the United States is authorized to provide funding to State correctional agencies to assist in the development and operation of mandatory literacy training programs for persons incarcerated in the States' correctional facilities. In addition, Title VII of the Act amends the Domestic Volunteer Services Act to authorize the Director of the Action Agency to award "challenge grants" to public agencies and private organizations to establish and operate community or employee literacy programs that will utilize the services of full- or part-time volunteers.

Other programs authorized under this act include the establishment of a National Literacy Assistance Collaborative within the Department of Labor to provide assistance to employers, business associations, and labor organizations in implementing workplace literacy programs (Title II) and funding to assist in the establishment and operation of adult education programs to assist commercial drivers in successfully completing the knowledge test requirements under the Motor Vehicle Safety Act of 1986 (Title IV).

Older Americans Act (42 U.S.C. § 3001)

The Older Americans Act sets out a range of Federal assistance to State agencies on aging to fund programs that provide a number of supportive services to the elderly. Under Title III of the Act, funds are distributed by the Department of Health and Human Services, Administration on Aging, to State agencies on aging to fund programs which provide, among many other services, "education and training" to persons age 60 or older. Local education and training services for which funds may be granted include programs that provide: consumer education, continuing education, health education, pre-retirement education, financial planning, and other education and training services.

Title IV of the Act authorizes the Commissioner of the Administration on Aging to make grants and enter into contracts with agencies, organizations, and institutions to "meet critical shortages of adequately trained personal in the field of aging" through the development of courses on aging at institutions of higher education, nondegree curricula at such institutions for practitioners in related fields, and additional training for persons already working in the field.

Title V provides authority for the Secretary of Labor to establish an "older American community service employment program" in which unemployed low-income persons age 55 or older may participate. In order to receive funding under this program, applicants are required to, among other things, provide "such training as is necessary to make the most effective use of the skills and talents [of program participants]." Also under Title V, the Secretary of Labor is authorized to enter into contracts with States, public agencies, nonprofit organizations, and private business concerns to fund "experi-

mental projects" that will provide "second career training" and placement of eligible persons in "employment opportunities with private business concerns." Participation in the "second career training" program is limited to a person age 55 or older, who has an income "equal to or less than the intermediate level retired couples budget as determined by the Bureau of Labor Statistics." Eligibility for other programs under Title V is generally limited to persons with income below 25 percent of the Federal poverty level.

In addition, Title VI of the Act authorizes the Secretary to make grants to tribal organizations and public or private nonprofit organizations to provide "supportive services and nutrition services to Native American Indians and native Hawaiians age 60 or older." Organizations are eligible if they represent or propose to serve at least 50 of such individuals and demonstrate the capacity to deliver such services. Services provided with Title VI funds may include health and nutrition education and other education and training activities. Upon approval of the application, grants must be made to the grant recipient for at least 12 months.

Omnibus Trade and Competitiveness Act of 1988, Title VI (20 U.S.C. § 5101)

Title VI of this Act authorizes the Secretary of Education to establish a program of grants to State and local educational agencies; consortia of public and private agencies, organizations, and institutions; and institutions of higher education to establish technology education programs for secondary schools, vocational education centers, and community colleges.

Eligible recipients must submit applications to the Department of Education containing: a description of the proposed technology education program; an estimate of the program's cost; a description of proposed procedures to be used to evaluate the program; assurances that Federal funds will be used to supplement and not supplant State and local funding; provisions for submitting reports required by the Department; and a description of activities to coordinate the program with programs under the Job Training Partnership Act, the Carl D. Perkins Vocational Education Act and other related acts. Federal assistance to a technology education

program may not exceed 65 percent of the cost of such program.

Partnerships in Education for Mathematics, Science and Engineering Act (20 U.S.C. § 3981)

This act amends Title III of the Education for Economic Security Act to authorize the Secretary of Education to make direct grants (to supplement State and local resources) to institutions of higher education and local education agencies to establish partnerships between such entities and business concerns, nonprofit private organizations, professional mathematic and scientific associations, museums, libraries, educational television stations, and appropriate State agencies to conduct activities that will improve teacher instruction and encourage student participation in the fields related to mathematics, science, computer science, and engineering.

Activities for which a grant may be awarded to a partnership between an institution of higher education and another entity include: programs to improve the instruction of mathematics, computer science, science, and engineering at the post-secondary level; the award of scholarships to students in such fields; and faculty exchange programs between the institution and business concerns within the State. Partnerships between local educational agencies and other entities may use the funds for, among other things, training and retraining of faculty at local elementary and secondary schools through cooperative agreements between the local or State educational agency and local business concerns. In addition, the Act authorizes the Secretary to make grants to the States to assist in the funding of programs that will improve the quality of teacher instruction in mathematics and science in elementary and secondary schools.

Refugee Education Assistance Act of 1980 (8 U.S.C. § 1522)

The Refugee Education Assistance Act authorizes the provision of Federal funding to State and local education agencies to assist in the education of Cuban and Haitian refugee children and adults. Title IV of the Act requires the Secretary of Education to make payments to State educational agencies to assist in the provision

of adult education programs for Cuban and Haitian refugees, aged 16 or older, who are not enrolled in an elementary or secondary school under the jurisdiction of a local educational agency within the State. Funds provided to the State educational agency may be used for programs of instruction in basic reading and mathematics, as well as, "educational support services" including counseling with regard to educational, career, and employment opportunities.

Rehabilitation Act of 1973 (29 U.S.C. § 701)

The Rehabilitation Act of 1973 authorizes a number of vocational rehabilitation and training programs designed to "maximize [the] employability, independence and integration into the workplace and the community" of disabled persons. Title I, Part A of the Act authorizes the Commissioner of the Department of Education's Rehabilitation Administration to make grants to States for the provision of vocational rehabilitation and training services, which include "personal and vocational adjustment [training], books, and other training materials, and services to the families of such individuals as are necessary to the adjustment or rehabilitation of such individuals." Funds may also be utilized under this program to provide disabled individuals with training that will provide new employment opportunities in the fields of "rehabilitation, health, welfare, public safety, and law enforcement, and other appropriate service employment." To receive a grant, States are required to develop and submit to the Commissioner a "State Plan" for the provision of rehabilitation and training services to the disabled population within the State. The plan must designate an agency within the State to be the sole agency responsible for administering and supervising services offered under the plan and contain other information required under the statute. Generally, rehabilitation and training services provided with funds granted under Title I are to be provided in accordance with the provisions of the State plan.

In addition, Part D of Title I authorizes grants to be made to the "governing body of Indian Tribes located on Federal or State reservations" to assist in the provision of rehabilitation and training services on such reservations. Eligible recipients are required to submit an application to the Commissioner containing assurances

that the services to be provided on the reservation are comparable to services provided to other disabled individuals residing in the State and that the applicant has consulted with the State agency responsible for the administration of disabled rehabilitation and training services during the development of the application.

Title II of the Act establishes the National Institute on Disability and Rehabilitation Research and authorizes the director of the institute to make grants to States, institutions of higher education, and public or private agencies and organizations to assist in the funding of programs to train personnel involved in the provision of rehabilitation services and in rehabilitation-related research.

Similarly, Title III of the Act authorizes the Commissioner of the Rehabilitation Services Administration "to make grants to and contract with States and public and private nonprofit agencies and organizations, including institutions of higher education" to partially subsidize training, traineeships, and other activities which will increase the number of qualified personnel trained in providing rehabilitation services. Funds granted under this program are to be targeted toward areas within the field of rehabilitation services in which there is a shortage of personnel. Provision is also made under Title III for the administration of grants to the State agency designated under the "State Plan," required under Title I, to assist in the funding of vocational rehabilitation programs and services for migrant agricultural and seasonal farmworkers.

Snyder Act (25 U.S.C. § 13)

This act, among other things, extends the benefits of programs authorized under the Higher Education Act of 1965 to postsecondary schools administered by the Secretary of the Interior for Indians, which meet the definition of an "institution of higher education" under the Higher Education Act.

Stewart B. McKinney Homeless Assistance Act (42 U.S.C. § 11301)

Title VII of this act authorizes the Secretary of Education to make grants to State educational agencies to assist in the funding of programs providing literacy and remedial basic skills training for homeless adults.

States wishing to receive funding under this program are required to submit an application to the Secretary containing an estimate of the number of homeless expected to be served.

In addition, Title VII authorizes the Secretary of Labor to make grants to State and local public agencies, private nonprofit organizations, private businesses, and other appropriate entities to conduct "job training demonstration projects" for homeless individuals. "Demonstration grants" received under this authority may be used to provide a number of education and training services to the homeless including: basic skills instruction; remedial education activities; basic literacy instruction; and job preparatory training, including résumé writing and interviewing skills.

Veterans Education and Employment Assistance Act of 1976 (38 U.S.C. § 1601)

This act provides education and training benefits to persons who entered the military on or after January 1, 1977, and before July 1, 1985; served on active duty for more than 180 days (or were discharged prior to 180 days of service for a service-related disability) and were discharged under conditions other than dishonorable. Under the Act, eligible persons electing to enroll in the program have deducted and deposited into a special account between $25 and $100 from their pay per month which is matched by the Department of Defense on a 2-to-1 basis. Program participants may contribute a maximum of $2,700.

Participation in the program is required for at least 12 consecutive months once the person has elected to enroll unless the person suspends participation or disenrolls because of personal hardship or if the participant is discharged or released from active duty. Contributions made by the participant may be refunded after such disenrollment or upon the participant's death (in which case funds are refunded to the relatives of the deceased), however funds contributed by the Department of Defense to the participant's account are refunded to the Secretary of Defense. Program participants are entitled under the act to a maximum of 36 monthly payments which are made only for periods of time in which the participant is actually enrolled in an approved edu-

cation program and, generally, only after discharge or release from active duty.

Benefits received under the program may be used for full- or part-time training at an educational institution, on-the-job training, and apprenticeship programs. Program participants are ineligible to participate in the program authorized by the Veteran's Educational Assistance Act of 1984.

Veteran's Education Assistance Act of 1968 (38 U.S.C. § 1700)

This act provides educational assistance to the children and spouses of veterans who died or were permanently disabled as a result of a service-connected disability. Spouses and children are also eligible under the Act if a person in military service has been listed as missing in action, captured in the line of duty by a hostile force, or forcibly detained for more than 90 days. Children of deceased or disabled veterans are eligible to receive benefits under the program commencing on the 18th birthday of the child and ending on the child's 26th birthday. Spouses are eligible for a period of 10 years from the date of the service-connected death or disability.

Eligible recipients under the program are required to submit an application to the Secretary of Defense containing such information as the Secretary may require by regulation. The Secretary must approve the application upon a finding that: the course of study proposed by the child or spouse constitutes a "program of education" as defined in the Act; the applicant is not already qualified in the area in which the person seeks to study; the educational institution or training in which the applicant proposes to enroll meets certain statutory requirements; and the enrollment of the applicant in the proposed education program would not violate the statute. The Secretary is required to disapprove an application that proposes enrollment in a bartending or personal development course, sales or sales management courses which do not provide specialized training within a specific vocational field, courses which are recreational in nature, and independent study courses unless such courses lead to a standard college degree. Eligible recipients may receive educational assistance for up to 45 months. Children and spouses of military veterans are

not eligible to receive assistance under the Act if the veteran was discharged from active duty on terms other than honorable.

Veteran's Educational Assistance Act of 1984 (38 U.S.C. § 1400)

The Veteran's Educational Assistance Act of 1984 was originally enacted "to assist in the readjustment of members of the Armed Forces to civilian life after their separation from military service; . . . to aid in the recruitment of highly qualified personnel for both the active and reserve components of the Armed Forces; . . . [and] to enhance our Nation's competitiveness through the development of a more highly educated and productive workforce." Although the benefits under the Act are geared generally toward persons entering the Armed Forces after June 30, 1985, individuals are also eligible if on December 31, 1989, they were eligible to receive benefits under the Vietnam era veteran's educational assistance program (*i.e.*, some Korean War and Vietnam veterans) and served continuously on active duty from October 19, 1984, through June 30, 1988. Individuals who have served on reserve status are eligible if they had remaining eligibility under the Vietnam Era GI Bill on December 31, 1989, and had served continuously in such status from October 19, 1984, through June 30, 1987. In addition, persons eligible under this provision must have completed the requirements for a high school diploma (or its equivalent) by December 31, 1989, or have completed at least 12 semester hours of postsecondary credit on that date.

Generally, benefits are paid to eligible recipients at a monthly rate of $350 to pursue full-time training and a lesser amount for enrollment on a part-time basis. Benefits are paid under the program for a maximum of 36 months and must generally be claimed within 10 years from the date of the individual's separation from service. Benefits may be used to pursue courses of study on a full- or part-time basis at an approved institution, on-the-job training, apprenticeships and correspondence courses.

Women's Educational Equity Act of 1978 (20 U.S.C. § 3041)

This act authorizes the Secretary of Education to make grants to and enter into contracts with public agencies, private nonprofit agencies, organizations, institutions, and individuals to fund programs designed to provide equity in education programs as they relate to women. Included in the activities for which funds may be granted are the development of educational programs "to increase opportunities for adult women, including continuing education programs and programs for underemployed and unemployed women." In addition, grant recipients may use the funds to expand and improve existing programs for women in vocational education, career education, physical education, and educational administration.

Eligible recipients are required to submit an application to the Secretary containing: an assurance that the program for which the grant is sought will be administered by the recipient; a description of the program; and a description of the polices and procedures to evaluate the program for its effectiveness in carrying out the purposes of the Act.

APPENDIX D

ELDERLY: STATE SURVEY OF STATUTES OR POLICY CONCERNING TUITION FEES IN HIGHER EDUCATION INSTITUTIONS

(M. Ann Wolfe, Paralegal Specialist, American Law Division, Congressional Research Service, The Library of Congress)

SUMMARY

The statutes of the 50 States and the District of Columbia were searched for information which would allow or require a waiver or reduction of tuition fees for elderly persons who attend courses at State-supported institutions of higher education. It was discovered that 29 States [1] have established some sort of guideline within their statutes on this subject. Nine [2] additional States have created a State policy to waive or reduce such fees mostly on a space-available basis. The rest of the States [3] have remained silent both in their statutes and in their written State policies. It is common practice for individual educational institutions within all of the 50 States and the District of Columbia to establish their own tuition reduction policies, either in conformance with legislation or State policy or at their own initiative.

The statutes cited in this report are often available in the local libraries of the respective States. For more detailed information of the law in these States, it is suggested that these statutes be consulted. In those States where a State policy has been established, more infor-

[1] Arkansas, California, Connecticut, Delaware, Florida, Georgia, Hawaii, Illinois, Indiana, Kentucky, Louisiana, Maryland, Massachusetts, Michigan, Minnesota, Montana, New Jersey, New Mexico, New York, North Carolina, Ohio, Rhode Island, South Carolina, Tennessee, Texas, Utah, Virginia, Washington, and Wisconsin.

[2] Alaska, Idaho, Kansas, Nevada, New Hampshire, North Dakota, Oklahoma, Oregon, and South Dakota.

[3] Alabama, Arizona, Colorado, District of Columbia, Iowa, Maine, Mississippi, Missouri, Nebraska, Pennsylvania, Vermont, West Virginia, and Wyoming.

mation can be attained by calling the telephone number listed under such State in this report. Where no legislation or State policy has been established, it is suggested that the admissions office of each individual education institution be contacted.

ELDERLY: STATE SURVEY OF STATUTES OR POLICY CONCERNING TUITION FEES IN HIGHER EDUCATION INSTITUTIONS

ALABAMA

There is no legislation or State policy to waive or reduce tuition for senior citizens.

Information verified via telephone conversation 3-91. Brenda Carter, Department of Postsecondary Education, 205-269-2700.

ALASKA

State policy waives tuition for residents 60 years or older, on a space-available basis.

Information verified via telephone conversation 3-91. Julie Chavez, Regents Affairs Officer, 907-474-7908.

ARIZONA

There is no legislation or State policy to waive or reduce tuition for senior citizens.

Information verified via telephone conversation 3-91. Jing Luan, Building of Regents Office, 602-255-3109.

ARKANSAS

Arkansas Code of 1987 annotated, 1989 Supp. § 6-60-204; § 6-51-208.—Waives all general student fees at any State-supported institution of higher learning, for courses organized to grant credit, and at any State area vocational-technical school, to persons 60 years or older, on a space-available basis.

CALIFORNIA

West's Annotated California Code, 1991 Supp. Education Code § 89330-§ 89333.—Trustees of the California State University system *may* authorize the waiver application and regular session registration fees at any State university, for enrollment in regular credit courses, to person 60 years or older, on a space-available basis.

COLORADO

There is no legislation or State policy to waive or reduce tuition for senior citizens.

Information verified via telephone conversation 3-91. Tim Grieder, Academic Officer, Commission on Higher Education, 303-866-2723.

CONNECTICUT

Connecticut General Statutes Annotated, 1990 Supp. § 10a-77(d)(3) Community Colleges; § 10a-83(d)(3) Community Technical Colleges.—Waives tuition fee to persons 62 years or older, on a space-available basis.

§ 10a-99(d)(3) Connecticut State University; § 10a-105(e)(3) Connecticut State University school of medicine or dental medicine.—Waives tuition fee for enrollment in a degree-granting program, to persons 62 years or older, on a space-available basis.

DELAWARE

Delaware Code Annotated, 1990 Supp. 14 §§ 3421-3422.—Waives application, course, registration, and other related fees in any State-supported institution of higher learning to persons who are formal degree candidates and who are 60 years or older, on a space-available basis.

DISTRICT OF COLUMBIA

The University of the District of Columbia (UDC) is the District's only State-supported school. UDC waives tuition for students 60 years or older in courses for credit or audit.

Information verified via telephone conversation 3-91. Clabin Fieods, Director of Gerontology, University of D.C., 202-727-2778.

FLORIDA

West's Florida Statutes Annotated, 1990 Supp. § 240.235(4).—Waives application, course registration, and related fees in universities under the State University System, to residents who attend classes for credit and who are 60 years or older, on a space-available basis; no academic credit will be awarded under this waiver.

GEORGIA

Official Code of Georgia, 1990 Supp. § 20-3-31.1.—Waives fees (except for supplies and lab/shop fees) in courses scheduled for resident credit, except classes in dental, medical, veterinary, or law schools, to persons 62 years or older, on a space-available basis.

HAWAII

Hawaii Revised Statutes Annotated, 1990 Supp. § 304-14.5.—Waives tuition or fees at the University of Hawaii, for any credit class, to persons 60 years or older, on a space-available basis.

IDAHO

State policy reduces registration fee to $20 plus $5 per credit hour to residents who are 60 years or older, on a space-available basis. Special course fees may also be charged.

Information verified via telephone conversation 3-91. Bill Hargrove, Public Affairs Officer of State Board of Education, 208-334-3300.

ILLINOIS

Smith-Hurd Illinois Annotated Statutes, 1990 Supp. 144 § 1801-1803.—Waives tuition fee at public institutions of higher education to persons who have been accepted to enroll in regularly scheduled credit courses, who are 65 years or older and whose annual household income is less than $14,000, on a space-available basis.

INDIANA

Burns Indiana Statutes Annotated, 1990 Supp. § 20-12-19.3-1—§ 20-12-19.3-9.—Waives 50 percent of tuition fee to persons 60 years or older who are retired and not working full time and who have a high school degree or equivalent, on a space-available basis. Certain other limitations are specified in § 20-12-19.3-4(c).

IOWA

There is no legislation or State policy within the university or community college system to waive or reduce tuition for senior citizens.

Information verified via telephone conversation 3-91. Martha Kirker, Assistant Director of Academic Affairs

& Research, Board of Regents, 515-242-6116; Bob Yeager, Assistant Chief, Bureau of Education & Student Services for Community Colleges, 515-281-3570.

KANSAS

State policy waives tuition at State universities for a person 60 years or older to audit courses, on a space-available basis.

Information verified via telephone conversation 3-91. Betty Fincher, General Councils Office, Kansas Board of Regents, 913-296-3689.

KENTUCKY

Kentucky Revised Statutes Annotated, 1990 Supp. § 164.284.—Waives all tuition and fees at any State-supported institution of higher learning to any resident who is admitted and enrolled as a student and who is 65 years or older, on a space-available basis.

LOUISIANA

Louisiana Revised Statutes, 1991 Supp. 17:1807.—Waives tuition and other registration fees at a public college or university to any person 60 years or older. Provides such persons with a 50 percent reduction in the cost of textbooks and other aids to instruction when purchased from a public college or university-operated bookstore. (These exemptions and reductions are provided only if sufficient funds are appropriated by the legislature to reimburse the colleges and universities affected.)

MAINE

There is no legislation or State policy to waive or reduce tuition for senior citizens.

Information verified via telephone conversation 3-91. Fred Douglas, Director of Higher Education Services, 207-289-5803.

MARYLAND

Annotated Code of Maryland, 1990 Supp. § 13-301.—Waives tuition to any constituent institution of the University of Maryland system, for up to three courses per term, to any person 60 years or older who is retired and not employed full time and whose chief income is derived from retirement benefits, on a space-available

basis. (Senior citizens for whom tuition has been waived cannot exceed 2 percent of an institution's undergraduate full-time equivalent enrollment.)

§ 16-205.—Waives tuition to a community college to any resident 60 years or older or to any resident who is a retired and disabled person.

MASSACHUSETTS

Massachusetts General Laws Annotated, 1990 Supp. 69 § 7G.—Waives tuition fees at any State college, regional community college, Southeastern Massachusetts University, Lowell University, or the University of Massachusetts to any person 60 years or older, if the institution is not overenrolled.

MICHIGAN

Michigan Compiled Laws Annotated, 1990 Supp. § 389.123.—The Board of Trustees of a community college *may* waive tuition for a student who meets the admission requirements of the board and who is 60 years or older.

MINNESOTA

Minnesota Statutes Annotated, 1991 Supp. §§ 136A.80-136A.81.—Waives tuition (except for a $6 administrative fee per credit hour when taking the course for credit) and activity fee at any State university, community college, technical college, or the University of Minnesota to residents 62 years or older, on a space-available basis. The enrollee must pay laboratory and material fees.

MISSISSIPPI

There is no legislation or State policy to waive or reduce tuition for senior citizens.

Information verified via telephone conversation 3-91. Bill Smith, Research Analyst, Mississippi Institutions of Higher Education, 601-982-6257.

MISSOURI

There is no legislation or State policy to waive or reduce tuition for senior citizens.

Information verified via telephone conversation 3-91. Elden Wallace, Senior Associate of Missouri Coordinating Board of Higher Education, 314-751-2361.

MONTANA

Montana Code Annotated (1989) § 20-25-421.—The regents of the Montana university system *may* waive resident tuition to students 62 years or older. The Montana university system includes the University of Montana, Montana State University, Montana College of Mineral Science & Technology, Western Montana College of the University of Montana, Eastern Montana College, and Northern Montana College. § 20-25-201.

NEBRASKA

There is no legislation or State policy to waive or reduce tuition for senior citizens.

Information verified via telephone conversation 3-91. Gene Hulbert, Research Analyst, Nebraska Coordinating Commission for Post-Secondary Education, 402-471-2847.

NEVADA

State policy waives registration fee for credit or as auditors in any course to persons 62 years or older. The consent of the course instructor may be required. Such registration does not entitle a person to any privileges usually associated with registration, e.g. student association membership, health service, intercollegiate athletic tickets.

Information verified via telephone conversation 3-91. Mary Lou Mouser, Secretary of Board of Regents, 702-784-4958.

NEW HAMPSHIRE

State policy waives only the tuition fee to persons 65 years or older, on a space-available basis.

Marie Mills, Administrative Assistant, Department of Post-Secondary Technical Education, 603-271-2062.

NEW JERSEY

New Jersey Statutes Annotated, 1990 Supp. 18A:62-3.—Each public institution of higher education *may* waive tuition fees for persons 65 years or older, on a space-available basis; registration fees are not waived under this statute.

NEW MEXICO

New Mexico Statutes (1988), 1990 Supp. § 21-21D-1—§ 21-21D-5.—New Mexico's post-secondary degree-granting education institutions *may* reduce tuition fees ($5.00 per credit hour, up to 6 hours per semester) to residents 65 years or older, on a space-available basis; course-specific fee charges are not waived.

NEW YORK

McKinney's Consolidated Laws of New York Annotated, 1991 Supp. Education Law § 355, subd.2h(l).—State-operated institutions of the State university system *may* waive tuition to a student who is 60 years or older to audit courses, on a space-available basis.

NORTH CAROLINA

General Statutes of North Carolina, 1990 Supp. § 115B-1—§ 115B-6.—Waives tuition at State-supported institutions of higher education, community colleges, industrial education centers, and technical institutes to attend classes for credit or noncredit, to residents 65 years or older, on a space-available basis. This waiver does not include any other fees nor the cost of textbooks.

NORTH DAKOTA

State policy waives tuition fee for auditing courses, for on-campus courses, to persons 65 years or older, on a space-available basis.

Information verified via telephone conversation 3-91. Larry Isaak, Vice Chancellor for Administration of the North Dakota University System, 701-224-2960.

OHIO

Ohio Revised Code Annotated (1990) § 3345.27.—Waives tuition or matriculation fees at State universities or colleges for courses attended on a noncredit basis, to persons 60 years or older, on a space-available basis.

OKLAHOMA

State policy waives tuition fees, for auditing courses, to residents 65 years or older, on a space-available basis.

Information verified via telephone conversation 3-91. Patricia Paske, Administrative Manager of Oklahoma State Regents for Higher Education, 405-524-9138.

OREGON

State policy waives tuition fee to attend classes on a noncredit basis, on space-available basis.

Information verified via telephone conversation 3-91. Lawrence Stubbert, Assistant Budget Director, State System of Higher Education, 503-346-5763.

PENNSYLVANIA

There is no legislation or State policy to waive or reduce tuition for senior citizens.

Information verified via telephone conversation 3-91. David Gray, State System of Higher Education, 717-783-8887.

RHODE ISLAND

General Laws of Rhode Island, 1990 Supp. § 16-55-1.—Waives tuition at any public institution of higher education to residents who are 60 years or older, on a space-available basis. This benefit is at the discretion of the particular institution where application is made.

SOUTH CAROLINA

Code of Laws of South Carolina, 1990 Supp. § 59-111-310.—Waives tuition at any State-supported college, university, or institution under the jurisdiction of the State Board for Technical and Comprehensive Education, to residents who attend credit or noncredit classes and who are 60 years or older, on a space-available basis.

SOUTH DAKOTA

State policy reduces tuition by one-quarter of the cost of other residents for persons 65 years or older for credit courses.

Information verified via telephone conversation 3-91. Monte Kramer, Assistant Director, Budget & Finance, Board of Regents, 605-773-3455.

TENNESSEE

Tennessee Code Annotated (1990) § 49-7-113.—Waives tuition, maintenance, student activity, and registration

fee at State-supported colleges and universities, to persons domiciled in Tennessee, who audit courses or attend for credit and who are 65 years or older, on a space-available basis. The board of regents of the State university and community college system *may* charge a service fee not to exceed $50 a quarter or $75 a semester to defray the cost of keeping records for the student. The waiver does not apply at medical, dental or pharmacy schools.

TEXAS

Texas Codes Annotated, 1991 Supp. Education Code § 54.210.—The governing board of a State-supported institution of higher education *may* waive the tuition fee for persons 65 years or older to audit any course, on a space-available basis.

UTAH

Utah Code Annotated, 1990 Supp. § 53B-9-101—§ 53B-9-103.—Waives tuition fee at institutions of higher learning to residents 62 years or older, on a space-available basis; the quarterly registration fee is not waived.

VERMONT

There is no legislation or State policy to waive or reduce tuition for senior citizens.

Information verified via telephone conversation 3-91. Suzanne Villanti, Higher Education Analyst, 802-828-2376.

VIRGINIA

Code of Virginia, 1990 Supp. § 23-38.54—§ 23-38.60.—Waives tuition and registration fees at any State institution of higher education to a person who is domiciled in Virginia, who had a taxable income not exceeding $10,000 for the prior year and who is 60 years or older, on a space-available basis. Registration is limited to no more than three courses in any one term, quarter or semester if the person is not enrolled for academic credit, but there is no limit to the number of terms, quarters or semesters in which a person may register.

WASHINGTON

West's Revised Code of Washington Annotated, 1991 Supp. § 28B.15.540.—Boards of Regents of the State universities and the State board for the community college *may* waive tuition, service, and activity fees to a resident who is enrolled for credit (if the course credits are not used to increase credentials or salary) and who is 60 years or older, on a space-available basis; such persons who enroll on an audit basis may be charged a nominal fee not to exceed $5 per quarter or semester. Registration is limited to not more than two quarter or semester courses at one time.

WEST VIRGINIA

There is no legislation or State policy to waive or reduce tuition for senior citizens.

Information verified via telephone conversation 3-91. JoAnn Raines, Legislative Liaison, Higher Education, 304-348-2104.

WISCONSIN

West's Wisconsin Statutes Annotated, 1990 Supp. § 38-24.—Waives program fees in vocational-adult programs to persons 62 years or older. State policy waives tuition for all residents to audit classes within the university system.

Information verified via telephone conversation 3-91. Raymond Marmocha, Assistant Vice-President of University System, 608-262-5893.

WYOMING

There is no legislation or policy to waive or reduce tuition for senior citizens.

Information verified via telephone conversation 3-91. Jim Meznek, Executive Director, Community College Commission, 307-777-7763.

M. ANN WOLFE,
Paralegal Specialist, American Law Division,
March 28, 1991.

UPDATE OF STATE SURVEY OF STATUTES CONCERNING TUITION FEES IN HIGHER EDUCATION INSTITUTIONS

A computer search of State statutes concerning the waiver or reduction of tuition fees for the elderly in

higher education institutions within the 50 States and the District of Columbia, was undertaken on September 3, 1991. This search revealed that changes should be made in two States, Maryland and Massachusetts.

In addition to § 13-301 as reported on page 5 for the State of Maryland, two sections should be included from the Maryland Education Code, i.e., § 14-107 and § 14-206. These sections specifically name Morgan State University and St. Mary's College, respectively, as waiving tuition under the same conditions that are specified for the University of Maryland (§ 13-301).

Also, since this report was printed, Massachusetts has repealed 69 § 7G and has enacted Chapter 142, Acts of 1991, § 19. This law directs the Higher Education Coordinating Council to establish guidelines to administer tuition waivers for special categories, including senior citizens. As of September, 1991, the council guidelines have not been finalized. (Information verified via telephone conversation 9-91, by Joe Sullivan, Higher Education Coordinating Council, 617-727-7785.)

Information concerning States which have not enacted legislation has not been updated since March 1991, the date of this report.

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ALIROW
1607 Angelus Avenue
Los Angeles, California 90026

American Association of Retired Persons
601 E Street, N.W.
Washington, D.C. 20049
(202) 434-2277

Center for Creative Retirement
University of North Carolina-Asheville
Asheville, North Carolina 28804-3299
704-251-6140

Chemetka Community College
College for Older Adults
P.O. Box 14007
Salem, Oregon 97309
(503) 399-5139

Cherokee Nation of Oklahoma
Adult Education Program
P.O. Box 948
Tahlequah, Oklahoma 74465
(918) 456-0671, (918) 458-0484

Committee for Economic Development
477 Madison Avenue
New York, New York 10022
(212) 688-2063

Connecticut State Department on Aging
175 Main Street
Hartford, Connecticut 06106
(203) 566-4810

The Cooperative Extension Service
U.S. Department of Agriculture
Room 3444 South
14th and Independence Avenue, S.W.
Washington, D.C. 20250-0900
(202) 720-2920

Elderhostel
75 Federal Street
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Elderhostel Institute Network
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The External Diploma Program
The Center for Adult Learning and Educational Credentials
American Council on Education
One Dupont Circle, N.W.
Washington, D.C. 20036
(202) 939-9475

Federation of State Humanities Councils
1012 Fourteenth Street, N.W.
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(202) 393-5400

GED Testing Service
American Council on Education
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(617) 287-7330

Iowa City/Johnson County Senior Center
28 South Linn Street
Iowa City, Iowa 52240
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LaFarge Lifelong Learning Institute
1501 South Layton Boulevard
Milwaukee, Wisconsin 53215
(414) 383-2550

Lane Community College
1059 Willamette Street
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LEIF (Learning English Through Intergenerational Friendship)
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Boston, Massachusetts 02210-2078
(617) 439-5580

Poetry Program
St. Francis House Adult Day Health Care
c/o Dr. Fredda Blanchard-Fields
Department of Psychology

Louisiana State University
Baton Rouge, Louisiana 70803

Rosa Keller Campus
Touro Infirmary
The Woldenberg Center for Gerontological Studies
1401 Foucher Street
New Orleans, Louisiana 70115-3593
(504) 286-6168

Senior Multi-Purpose Center
Community Services Building
6 Gauntt Place
Flemington, New Jersey 08822
(201) 788-1359

SeniorNet
399 Arguello Boulevard
San Francisco, California 94118
(415) 750-5030

Shepherd's Centers of America
6700 Troost Street
Suite 616
Kansas City, Missouri 64131
(816) 523-1080

Siouxland Senior Center
(Talk Show)
217 Pierce Street
P.O. Box 806
Sioux City, Iowa 51102
(712) 255-1729

TESOL (Teachers of English to Speakers of Other Languages, Inc.)
1600 Cameron Street
Suite 300
Alexandria, Virginia 22314
(703) 836-0774

Union City Older Workers Day Care Training Program
138-39th Street
Union City, New Jersey 07087
(201) 348-2754
219-47th Street
Union City, New Jersey 07087
(201) 348-2750

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